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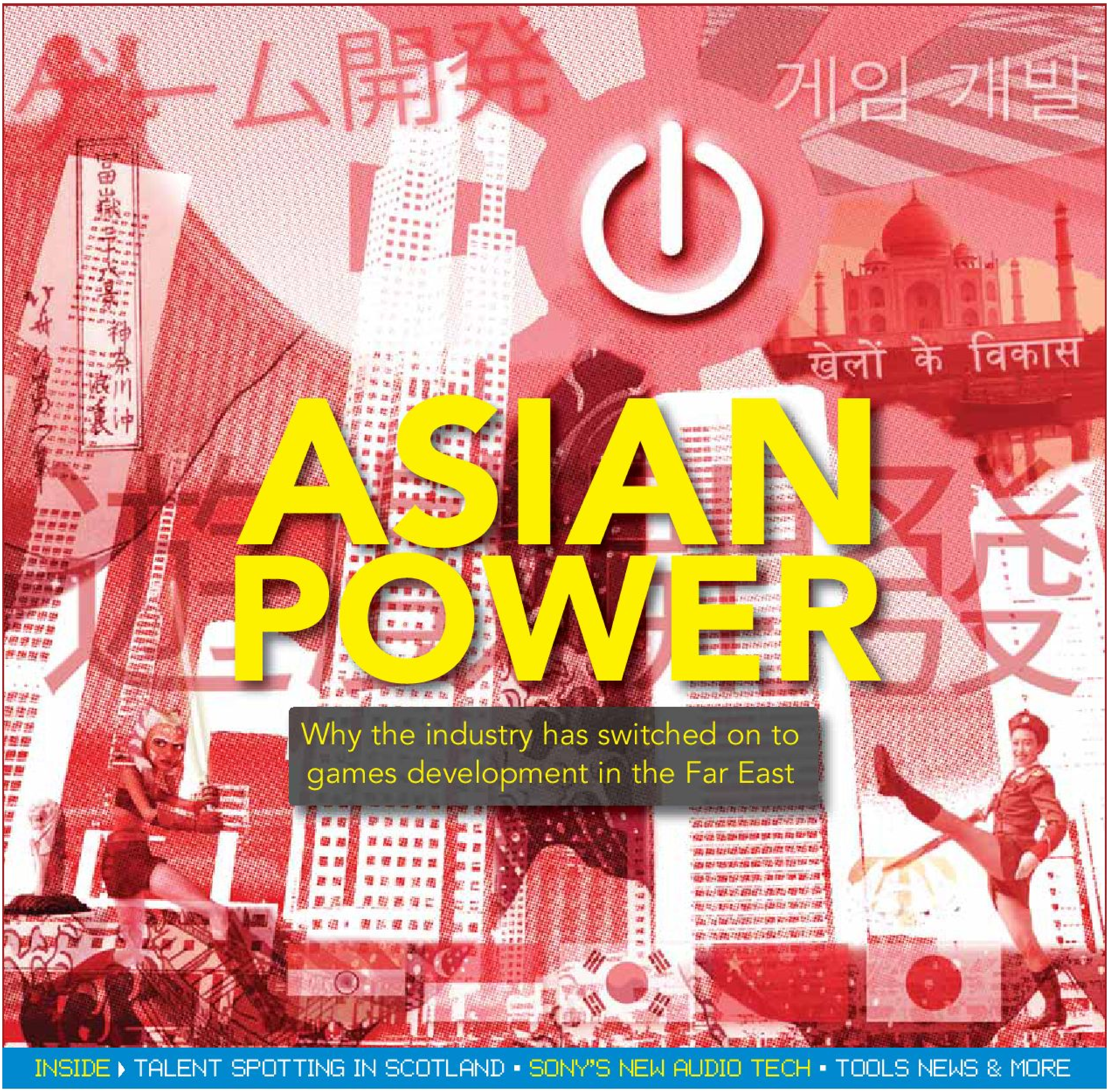

ASIAN POWER

Why the industry has switched on to games development in the Far East

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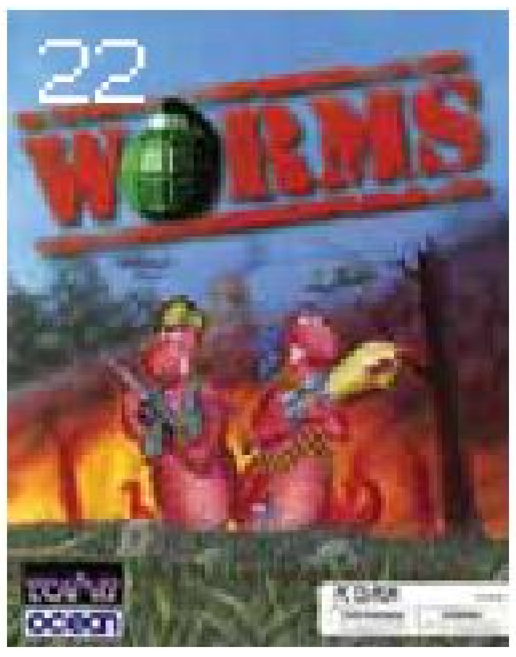

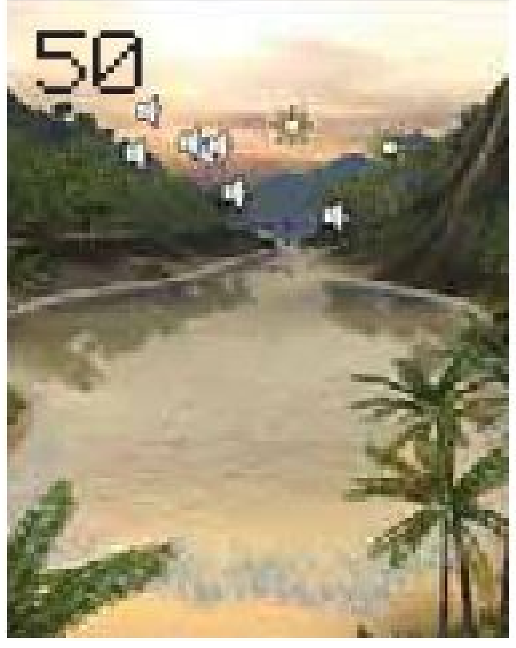

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ALPHA

ADVENTURES IN GAMES DEVELOPMENT: NEWS, VIEWS & MORE

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East meets West

THQ the latest to establish Asian foothold, chasing publishing and development deals via new Shanghai office

by Michael French

AS IF FURTHER PROOF were needed that the Western games industry is looking to Asia to grow its business and harness low-cost development, THQ has thrown its weight behind the Chinese games scene with opening of a new studio in Shanghai.

Described as an outpost that will "pursue new development opportunities and expand publishing partnerships in the fast growing Chinese market", the office will oversee THQ External Development Group's (XDG) Global Operations and China development initiatives.

THQ already has relations with local developers and publishers, but it is hoped that the Shanghai office will help spearhead more deals to develop and publish both online and packaged games for distribution in the local market and globally.

The first of such games is already in the works, as THQ plans to launch *Company of Heroes Online*, a free-to-play, micro-transaction game based on the Relic-developed original (*pictured*), but designed specifically for Asia in collaboration with its China publishing partner Shanda Interactive Entertainment.

> ***"We view China as an integral part of our greater Asia online strategy..."***
> ***Martin Good, SVP THQ Asia Pacific***

"The Asian markets represent a significant growth opportunity for THQ, particularly as we execute on our strategy to grow revenue from online gaming, an increasingly important segment for our industry," said Martin Good, senior vice president of THQ Asia Pacific.

"We look forward to continuing to build new publishing and development relationships in China to expand our presence in this important and fast growing gaming market.

"We view our China initiative as an integral part of our greater Asia online strategy."

Tim Page, market development director for Asia Pacific, and Kevin Chu, corporate director of THQ's XDG, will lead publishing and product development efforts.

Page will lead efforts to expand THQ's online gaming portfolio by establishing and maintaining local publishing partnerships as well as bringing THQ online content to other markets around the world. Over the past few years, he has been responsible for THQ's online strategy for Asia, building partnerships and sourcing new online products, many of which THQ says are yet to be announced. Chu will run THQ's global outsourcing operations and assist in local product development initiatives from Shanghai.

Steve Dauterman, senior vice president of product development at THQ, pointed out that publisher will not only be widening the remit of its development team, but lowering its costbase, too. "By expanding our development operations and deepening our commitment to the local market, we will accelerate our growth in Asia and at the same time improve the efficiency of our development processes worldwide."

THQ added that it hopes to take advantage of China's fast growing online games market, which was valued at $1.7 billion in 2007 and reached more than 42 million online gamers – the the market is expected to grow to $4.2 billion by 2010 according to research firm Niko Partners.

Find out more about the activities of Ubisoft, LucasArts, SCEE and others in Asia by turning to our series of special features analysing this booming market for games development. The story starts on page 34.

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Editorial

Asia specific

IN A COMMENT ON Developmag.com last month *Sensible Soccer* designer Jon Hare lamented the demise of small businesses under New Labour – and predicted that in 20 years our industry will end up the '51st state of the superpower that is India'.

Classic Hare, but not hair-brained. While he may be wrong about the nature of our eventual affiliation with developers in the East, he's correct about the eventuality. There is a lot of recent talk about Asia amongst the development community in the UK, especially at a senior level – and not just in terms of how well Team GB did at the Olympics. Nor is it the simple thinking that high-heat/low-cost regions are good for outsourcing. No, this new way of thinking, deterred by high-costs in North America and the UK, is paving the way for the opening of fully-fledged studios in emergent markets – teams built from and embracing the local culture, yet performing on the world stage.

EA has already done it, with a new Indian mobile team. SCEE, meanwhile, with its dev relations teams courting developers in India, may even follow suit. And it was in these pages two months ago that SCE WWS boss Shuhei Yoshida said Ubisoft was the trendsetter for global expansion – and with studios in Shanghai, Singapore and other climes, you can't disagree.

And lets not forget the moves by the more independent studios, LucasArts and its Singapore team, plus the efforts of those like Sumo Digital's outpost in Pune, India, which make it clear that migration of the Western games business onto Eastern shores is in full effect. Kuju, too, has recently expanded into the region with a new office – more on that can be found at developmag.com.

That's why we turn the spotlight on the region this month, to offer a refresher for those keen to know how the likes of Ubisoft have gained an impressive foothold in China; why expansion to India has become a hot topic; and what LucasArts has to say about helping grow a native industry in Singapore. We also dip our toes into the gaming industry culture in Japan and South Korea. The Eastern promise begins on page 34.

Michael French

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Michael.

Dragons' reject

Despite TV rejection from millionaire investors, indie developer Yann

by Michael French

Look out, Miyamoto. A Scottish independent games developer has devised some Wii software that trumps upcoming rhythm game *Wii Music* – and isn't letting a failed attempt to secure investment on BBC's *Dragon's Den* discourage him.

Yann Seznec appeared on the BBC business show last month, demonstrating his software *Wii LoopMachine*, but didn't excite the VC 'dragons' enough because he's an independent trying to crack the traditional publishing scene.

But Seznec has since told *Develop* that he is undeterred by comments from millionaires like Peter Jones, Deborah Meaden and Theo Paphitis and will find a way to get his game to market, having already been courted by a number of publishers and developers.

> ***"Motion control is a hugely romantic notion in the field of digital arts…"***
>
> ***Yann Seznec***

"The week following the screening of my episode was rather hectic," he told us.

"I would rather not mention anyone by name, but I was definitely surprised to learn that several large independent publishers and developers watched *Dragons' Den*."

Wii LoopMachine was developed entirely on the Mac by Seznec as part of his MSc in Sound Design at the University of Edinburgh. The app originally found an audience on the web early in 2007 virally, when the first version was released for free.

Since then, however, Seznec has been developing an updated V2 and a whole suite of music creation tools for the Wii. He already sells a MacOSX version (which uses the Wiimote via a Bluetooth connection) through his site, and is also working on a Windows-compatible version.

dev is undeterred

Seznec pledges to find an industry partner for his Wii music software

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LoopMachine
CREATIVE MUSIC SOFTWARE FOR THE WII

Main picture: Seznec demoing his software. Inset: His appearance on the BBC's VC investment show Dragons' Den

"When the Wii came out, I was captivated by the idea of low-cost motion control," he said. "As a performing electronic musician, I knew that movement is something that is really missing in electronic musician performance, so I designed a powerful and intuitive tool that could be used to quickly and easily create music through movement.

"The idea of moving to control a game, video, or audio, is obviously quite exciting, and it appeals to a wide range of people – in particular people who are not usually attracted to console gaming. Motion control is also a hugely romantic notion in the field of digital arts, which is often searching for more intuitive ways to control computers in an artistic fashion. In my case, the ability to have your movements translated into music really appealed to me."

Seznec is looking to target a pro-audio audience with the software, which isn't strictly a game but which he hopes will be sold to Wii-owning consumers.

He explained: "There is no gaming element to the *LoopMachine*, in that you do not 'win' anything and there are no levels. It is much closer to music software like Ableton Live or Reason. The vast majority of music-based titles for gaming consoles now are *Guitar Hero*-style karaoke games. That is fine, of course, and those will always be popular. But an enormous number of people want to make their own beats and music – just look at the number of YouTube 'how to make a beat' tutorial videos. The *LoopMachine* gives complete control to the player to make whatever music they like! However the huge advantage over traditional music creation software is that is uses a controller that is intimately familiar to millions of people around the world."

Seznec is looking to partner with a development studio to take the game forward and most likely distributed digitally.

"I am not a licensed developer. Because I have not developed any games previously I am finding it rather hard to get Nintendo's attention. At this point it seems more likely that the best route forward is to partner with an existing licensed developer," he told us.

"I think WiiWare is the most promising platform to take the *LoopMachine* forward. It's cheap and easy to develop for, and allows for rapid low-cost distribution. It definitely seems like the best way to introduce people to the LoopMachine on the Wii console."

www.theamazingrolo.net/wii/

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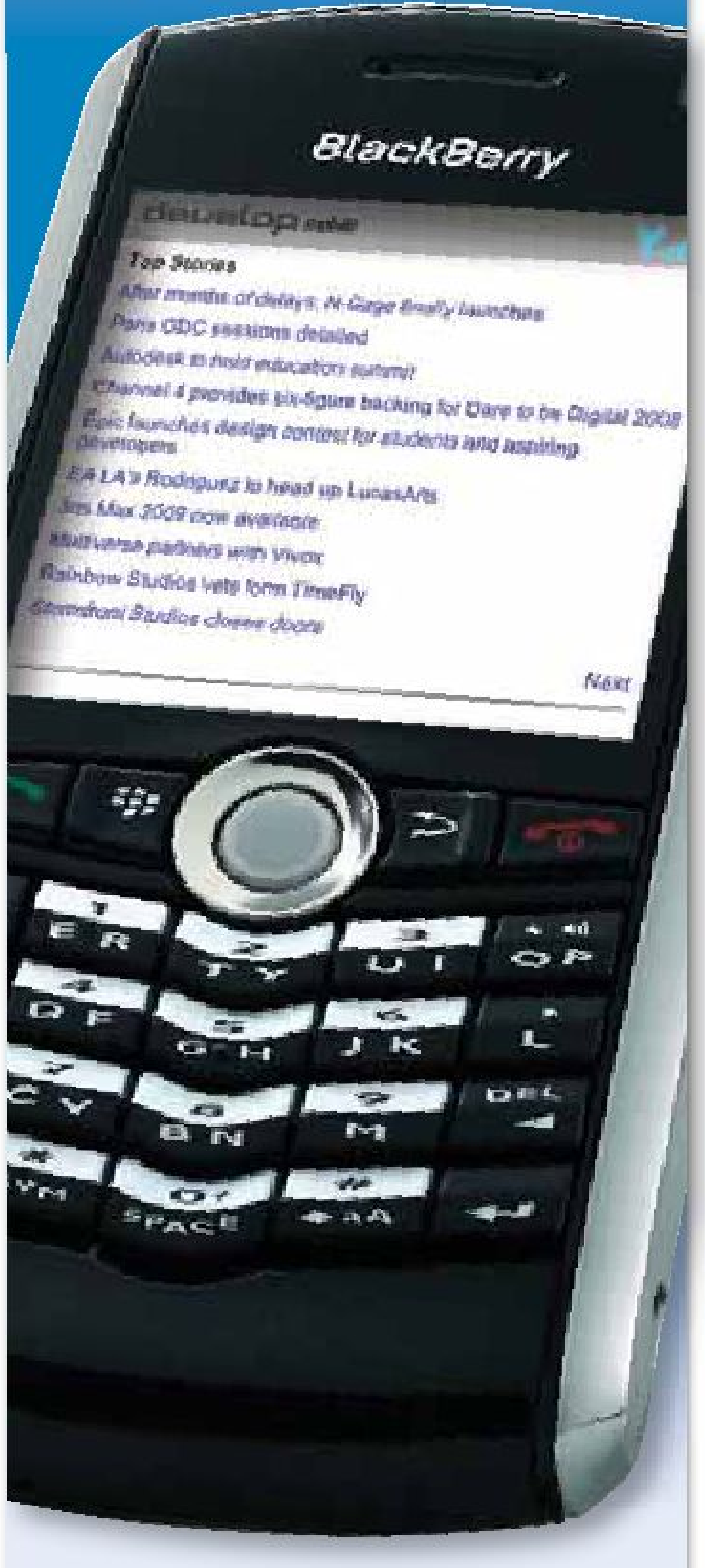

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Talent spotting

Forget designing games for the next-generation consoles, meet the next-generation of games designers…

by Michael French

Is One Zero, the design company formed by these teenage Scots, the Bungie or Lionhead of tomorrow?

Two young designers from Scotland have stepped into the industry spotlight through the founding of their firm One Zero, and are aiming high with plans to sell their idea for a new FPS to a top publisher.

Ewan Dodds (aged 14) and Gregory Foster (aged 16) are childhood friends who live just outside Edinburgh.

Despite their youth, the two already have secured a £500 business grant from the Prince's Trust's young entrepreneur Business Programme which the two are planning to invest in hardware and middleware to build their prototype. Smartly, the two don't think they'll be able to turn their idea for a triple-A shooter into a fully-fledged game alone – so instead are hoping to create a intellectual property they can sell to a publisher or developer.

"It all started at school when we had an idea for a good computer game and decided to make it. Researching it over the past year we've realised we can't do it just on ourselves," Dodds explained to *Develop* at the Edinburgh Interactive Festival. The two haven't been shy in playing up to their youthful innocence, however, having blagged their way into the Festival and then proceeded to schmooze the attendant execs, approaching the likes of Rod Cousens for advice during the event's coffee breaks.

"Right now we're trying to get together the money and build up the contacts," explained Dodds, armed with the delegate list and joking that he was treating the collection of bigwig business cards 'like Pokémon'.

Jokes and youthful innocence, however, don't seem to disguise the fact that the team at One Zero (it's binary for two) have their heads screwed on about how they will put their plan into action – and both are confident they have a winning idea.

> ***"It's less about the money and more about the game. We have a good idea and are prepared to take time to get it right…"***
> ***Ewan Dodds (aged 14) and Gregory Foster (aged 16), One Zero***

Their concept, still to be built as a full prototype however, is a shooter which Dodds likens to *Gears of War* with "nice gory, meaty violence" (he dodged the question about being too young to legally own the 18-rated Epic title – or the later-mentioned *Bioshock* and *Halo* – joking he only has the games for "market research purposes"). The game is inspired by their favourite titles – the two are fans of shooters and real-time strategy games, enjoying the multiplayer components in the likes *Halo* and *Gears of War*.

One Zero's concept will boast a mix of third-person and first-person action as the key gameplay mechanic, setting the title up for a mix visceral shooting and slower-paced horror aspects. The (of course) guarded storyline involves time travel, making for an experience Dodds concedes might sound "complicated, maybe convoluted" to some, but which Foster says is nevertheless "ambitious".

Adds Dodds: "I think with the success of games like *Bioshock* there is now an appetite amongst publishers for shooters that are inventive or different."

But like *Bioshock* and *Gears of War*, the two are planning to build a franchise rather than a one-off idea. "All the companies I talk to say that they are expecting a franchise, so we're thinking of creating a property like *Final Fantasy* that can have nineteen sequels rather than one game," says Dodds.

Still, they don't want to run before they can walk and are now focusing on the prototype – depending how that fits in between school, of course.

Much of the programming will be handled by maths whizzkid Foster (Dodds is the self-described chattier "front guy"). Typical for a coder, Foster says less than his business partner and friend, but he tells us: "We can't build a full game ourselves, but we'll build a demo." He's chosen the Unity Engine for that. "It's not expensive, and we can't really afford Unreal Engine 3 on our £2 a week pocket money. We just want a cheap and quick engine – it doesn't need to be amazingly powerful because we just want a prototype that will run for 20 minutes."

Once that is built, the idea is to sell the game to a publisher for a flat fee, or work on a consultancy basis collaborating on sequels in exchange for a royalty. The two have already held meetings with UK publishing execs, games studios and universities for advice and have realistic expectations for what might come of One Zero's efforts. Says Dodds, "We're prepared to take some cash if a publisher likes the idea, but turns around and says 'Right we don't want to talk to you any more'." Then the two could turn their minds to their next idea which they could sell on, he says. And if publishers don't like the idea? Foster is pragmatic: "Then it'll help on our CVs and for when we go to university."

The two aren't particularly bothered if the industry doesn't take the two young designers seriously, either. Adds Dodds: "Well, I don't think we're taking ourselves too seriously to be honest. It's less about the money and more about the game at the moment. We have a good idea and are prepared to take time to get that right and prove we can do it."

iPhone gaming – the goldrush begins

'Everybody with money to spend on development is looking at iPhone,' says Kuju-owned UK team Doublesix

by Michael French

UK DOWNLOADABLE GAMES studio Doublesix has predicted a huge boom in the iPhone games market, claiming that every major games company is clamouring to produce content for Apple's mobile phone.

Inspired by the booming sales of Apple games content, including the 300,000 in 20 days sales of Sega's *Super Monkey Ball*, 'everybody who has money to spend on games development is looking at the iPhone space' according to studio head James Brooksby in an interview with *Develop*. Talking as part of an interview covering the studio's first year of business, Brooksby discusses the changing attitudes towards digitally distributed games amongst publishers – and says that much of publisher activity is centered around iPhone, with passion for the platform amongst the industry being "unbelievably strong".

Doublesix, whose business includes a mix of work-for-hire and original IP projects, has been solicited for iPhone games with publishers desperate to get games ready by the end of the year.

"If the mood change from cold reception to hot perception had to take a year for Xbox Live Arcade, publishers have been switched on to iPhone in just two months," explained Brooksby. "It's ridiculously fast, going from publishers' very cold 'we're thinking about it' point of view to a queue of people saying 'let's do something, can you get it done by Christmas?'"

Last month, Apple revealed around $1m in consumer cash was spent on iPhone Apps a day, meaning the firm would be seeing revenues of at least $360m a year – the company's CEO, Steve Jobs, predicted it could hit $500m a year soon. Jobs told the *Wall Street Journal*: "Who knows, maybe it will be a $1 billion marketplace at some point. I've never seen anything like this in my career for software."

Brooksby says this thinking has tickled publishers: "Anybody and everybody who has money to spend on games development is looking at the iPhone space. There is no one – except for Sony, Nintendo and Microsoft, obviously – that hasn't asked us about it. We were talking to Apple in early spring and we had a similar view to everyone else – we weren't sure where it would go and thought it could go the way of mobile games. But we had a four-hour meeting with Apple and our eyeballs were well and truly widened; theirs too because they are still learning a lot about games."

"The iPhone story is going to be huge – the *Monkey Ball* numbers have made people site up and take notice."But Brooksby said that the opportunity to capitalise on the popularity of games content for iPhone lies as much with developers as it does publishers: "With iTunes being the foremost popular digital distribution platform I think it's going to just get bigger and bigger. It's also a perfect route for self-publishing."

> ***"I've never seen anything like this in my career for software…"***
> ***Steve Jobs, Apple***

Read the full interview online at www.developmag.com

DEVELOP DIARY

YOUR COMPLETE GAMES DEVELOPMENT EVENT CALENDAR FOR THE MONTHS AHEAD…

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www.austingdc.net

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SEPTEMBER 2008

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WOMEN IN GAMES
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Warwick University, UK
www.womeningames.com

AUSTIN GDC
September 15th to 18th
Texas, USA
www.austingdc.net

GAMES CONVENTION ASIA
September 18th to 20th
Singapore
www.gc-asia.sg

OCTOBER 2008

TOKYO GAME SHOW
October 9th to 12th
Tokyo, Japan
tgs.cesa.or.jp/english/

HANDHELD LEARNING 2008
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London, UK
www.handheldlearning2008.com

CASUAL CONNECT KYIV
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Kyiv, Ukraine
kyiv.casualconnect.org

CASUAL GAMES FORUM
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London, UK
www.tandemevents.co.uk

NOVEMBER 2008

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Lyon, France
www.game-connection.com

MONTREAL GAMES SUMMIT
November 6th & 7th
Montreal, Canada
www.sijm.ca/2008/

IGDA LEADERSHIP FORUM
November 13th & 14th
San Francisco, USA
www.igda.org/leadership/

GAME CONNECT: ASIA PACIFIC
November 19th to 22nd
Brisbane, Australia
www.gameconnectap.com

FEBRUARY 2008

CASUAL CONNECT KYIV
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DICE SUMMIT
February 18th to 20th
Las Vegas, USA
www.dicesummit.org

ELAN AWARDS
February 29th
Vancouver, Canada
www.theelans.com

MARCH 2009

GDC 09
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www.gdconf.com

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London, UK
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GAMES GRADS 09 - NORTH
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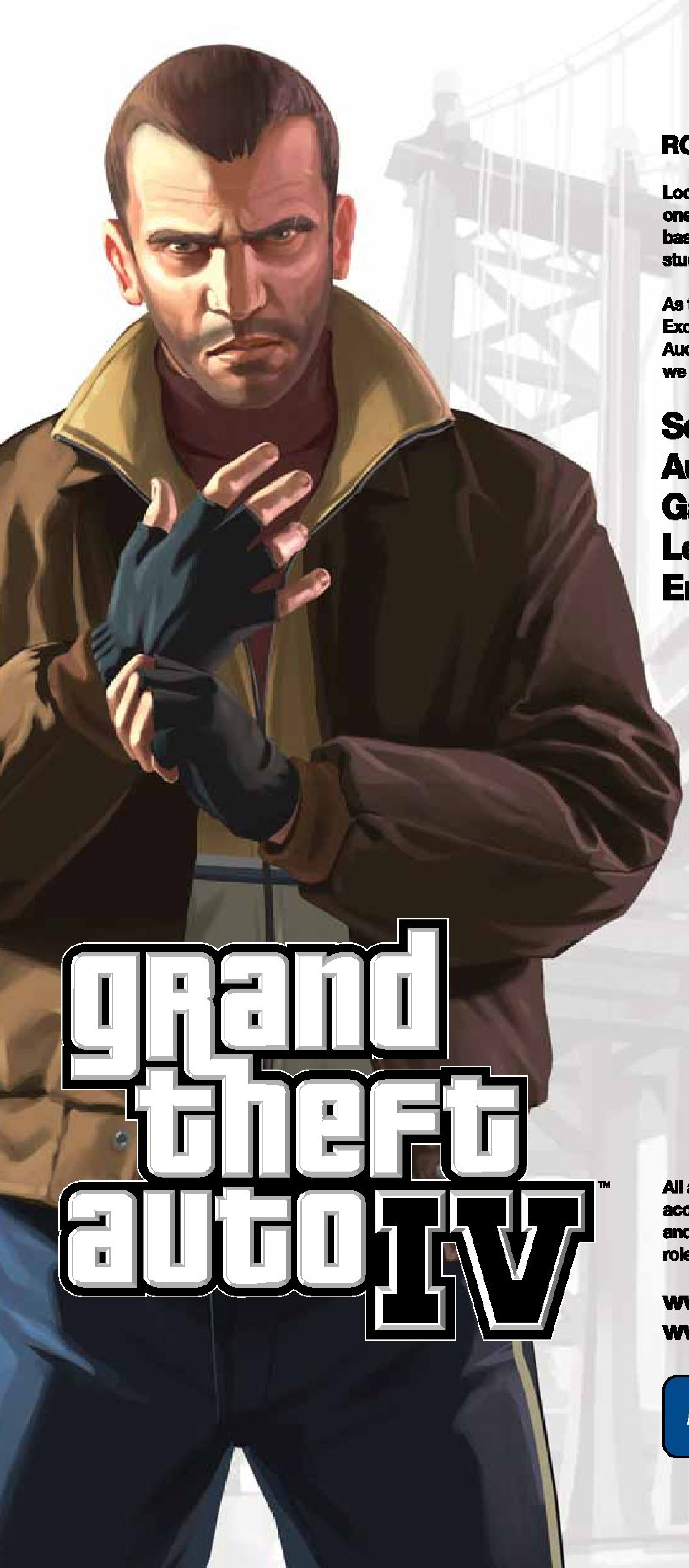

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MIND YOUR OWN BUSINESS

by Nick Gibson

German persistence

You may have missed the €70m (£55m/$110m) investment in German casual massively multiplayer online game developer/publisher Bigpoint in June this year because it went largely unmentioned in the specialist games press. The deal represented the single largest investment round ever achieved by a privately held European games company. Yes, the transaction was technically a buyout as the investors (GE/NBC Universal's Peacock Equity Fund and UK-based private equity company GMT) gained 70 per cent of the company, but the fact remains that this was, by European standards, a huge deal involving a company that had largely flown under the radar of the popular and trade press.

In fact, Hamburg-based Bigpoint is at the forefront of a wave of German casual MMOG companies that have been pioneering the concept of browser-based MMOG publishing. They have begun to take European MMO gaming in a different direction to either North America or Asia (where retail or large client MMOG downloads predominate) and have provided, in the space of just two to three years, a significant injection of energy and capital into the stuttering indigenous German games development and publishing market.

Together with Gameforge, Travian, Innogames, Alaplaya, Frogster Interactive and Gamigo, Bigpoint has revolutionised the European MMOG market reaching unheard-of player numbers and generating unprecedented usage which dwarfs anything achieved by any of the more traditional retail-and-subscription MMOGs.

Indeed Gameforge, Bigpoint and Travian not only rank in the top 10 most popular games services in Europe (source: comScore data, June 2008) along side the likes of casual giants Miniclip and Yahoo Games, but Gameforge is the seventh most popular worldwide ahead of all Disney casual games and virtual world properties (including Club Penguin) and twice as big as *World of Warcraft*. So how have they achieved this?

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News

Users of Bigpoint's MMOs generate more revenue each than World of Warcraft players do

Talking to a number of these companies a number of common critical success factors become apparent:

1. Low barriers to entry

Their games' minimal technical requirements maximises the addressable market of computers (and therefore players) able to play them. Most of the leading German trio's games are played in a browser using Flash, Java and plain old HTML in contrast to the download-oriented Asian and North American MMO markets. This allows them to have appeal for frustrated gamers without the money to buy the sort of PCs needed for modern retail PC games.

2. Broad localisation

The low minimum hardware specification is particularly appealing to younger gamers using hand-me-down computers but especially in central and eastern European territories. Bigpoint is localised into 17 languages, Gameforge caters for 25 languages whilst Travian now operates 40 different language versions. This has enabled their services to tap into a vast base of players unable or unwilling to read or communicate in English (the default and, in most cases, only language used for most traditional MMOGs).

3. Easy to play, hard to master

Most casual MMOGs offer a high level of gameplay accessibility that is rooted in the simplicity of their design and user interface. However, underneath their primitive-seeming surfaces, you'll find tried-and–tested, deep and persistent multi-player role-playing, simulation and strategy gameplay that keeps players invested in their progression within the game.

> ***"These German companies have unearthed a potential mass-market goldmine..."***

4. The 'Freemium' model

Most of the German titles are based around a micro-transaction revenue model that allows unlimited free play and optional virtual asset or service purchase. Contrary to popular belief, most of these assets and services are gameplay-enhancing such as single use munitions and limited duration player upgrades. Conversion of free to paying players tends to be below three per cent but those that do pay can generate monthly ARPU of €10 to €20 (Bigpoint have publicly stated that their monthly average revenue per paying player is higher than that for *WoW*). The beauty of this model is, again, its accessibility, attracting all types of players from those only willing or able to pay a few Euros to those wanting to spend hundreds of Euros in a single month.

Should we be surprised that so many companies in a single territory have identified and seized upon the opportunity presented by casual MMOGs and, in particular, persistent browser games? In such a small industry, innovators often generate followers, something seen frequently in the UK. It is, however, strange that they have established such a commanding market position whilst also generating what in many cases have become extremely profitable businesses. Most of Bigpoint, Gameforge, Innogames and Travian's games will have been developed for less than €0.5m but can be expected to return a huge multiple of that over their lifetime. Bigpoint is expected to turn over €20m this year, nearly double last year's reported revenue whilst Gameforge boasts that it has been cashflow positive and profitable from day one, grew its revenue 350 per cent in 2007 and is on course for 450 per cent growth this year.

With combined active monthly users of tens of millions in Europe alone, I believe these German companies have unearthed a potential mass-market goldmine rather than a short-term niche. There is still plenty of room for business model diversification and exploitation, product and service quality improvement (without taking them out of the browser), broader geographic expansion and, dare I say it, the commercial exploitation of third party brand licences. With global VCs also showing strong interest in this area, now might be the time to look continent-wards for innovative and highly profitable business models.

Nick Gibson is a director at Games Investor Consulting, providing research, strategy consulting and corporate finance services to the to the games, media and finance industries
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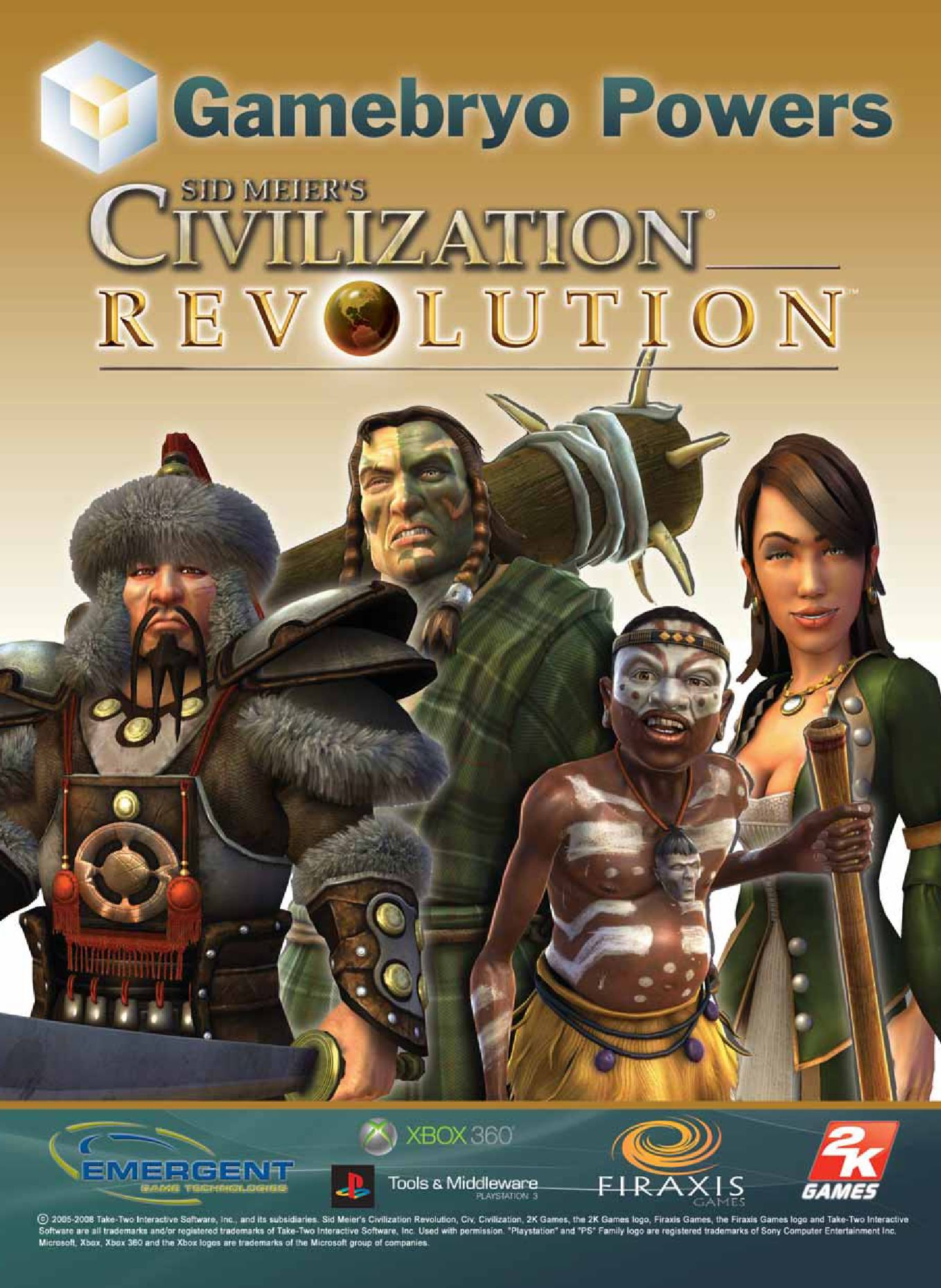

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VARIABLE DECLARATIONS

by Owain Bennallack

To the victor, the spoiling

So. Farewell then, Pivotal Games,
There was always Conflict,
But we didn't expect
A fatality.

Private Eye's teenage poet and obituarist E.J. Thribb would have had plenty of opportunity in his 17 and a half years to chronicle the death of independent studios.

But Pivotal's sad fate throws a light on a less appreciated reason for developer death. Most independent developers that have failed over the years had rubbish production processes, were creatively limited, or were financially over-stretched, either through recklessness or necessity, and so vulnerable to shocks such as a canning or the loss of key staff members. But that's not what's typically killed successful developers. Rather, publishers have. If you want to stop a great developer making great games, a good way has been to buy it.

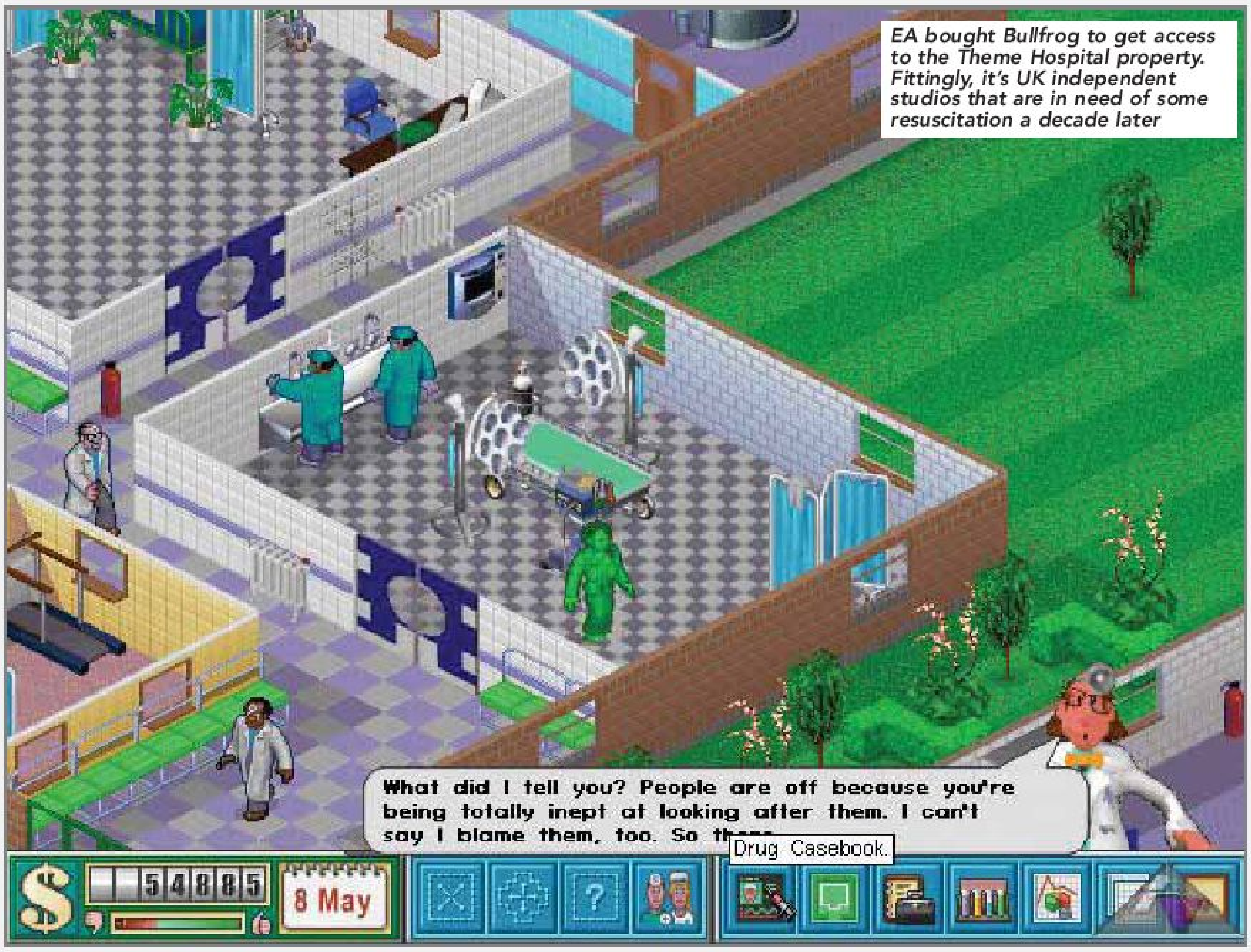
BULLFROG CROAKS IT

I was reminded of this when EA rebranded its Guildford studio to EA Bright Light. This isn't to criticise staff there, or the idea of making casual games under a new regime. Perhaps Bright Light will be the UK's answer to PopCap.

Surely, though, we can't forget this studio traces its roots to Peter Molyneux's once-mighty Bullfrog? EA didn't pay its millions to acquire puzzle games for mums, it wanted more *Syndicate Wars* and *Dungeon Keepers*. Exploring the story of Bullfrog would probably require a small book, but what's clear is it's a poster child for acquisitions gone awry. With most of what was once called BritSoft now in publisher's hands (Bizarre Creations and Evolution Studios being two of the latest indies to go), the risks for creatives revealed by such lamentable outcomes are of more than academic interest.

Bullfrog is hardly an isolated case. The late 1990s also saw EA pour water over whatever spark had made Westwood Studios and Origin Systems great, right after it poured money over them.

What went wrong? That all three studios had very entrepreneurial cultures and strong creative leaders is one obvious connection.



EA bought Bullfrog to get access to the Theme Hospital property. Fittingly, it's UK independent studios that are in need of some resuscitation a decade later

What did I tell you? People are off because you're being totally inept at looking after them. I can't say I blame them, too. So th

But you'd do no better to ask EA boss John Riccitiello, who told the DICE summit earlier in the year that: “We at EA blew it, and to a degree I was involved in these things, so I blew it. When I talked to the creators that populated these companies at the time, they felt like they were buried and stifled.”

> **“If you want to stop a great developer making great games, a good way has been to buy it...”**

Riccitiello says EA has learned its lesson, and argues that the way EA manages acquired companies now is informed by his previous experiences. We'll see. He's certainly warming to his theme, latterly admitting the publisher ‘tortured’ its Vancouver Need for Speed team by insisting on a game every 12 months for eight years. (It's since split the team in two, each working on two-year cycles).

INSIDER DEALING

Some studios thrive under a publishers' wing. A great example would be Neversoft, which has shone within Activision since 1999. Is it a coincidence that Neversoft spent years in the wilderness before being acquired, and had yet to really taste the success that came with the *Tony Hawk* series?

For its part EA might point to Criterion's great showing after acquisition. DMA's transformation into Rockstar North was also a clear win, although the Housers are hardly typical publishers, and in that case the founder, Dave Jones, had already made his excuses and left.

More studios are born free and should remain that way. Bungie has probably engineered itself a close escape from Microsoft. Having obtained its freedom there's now a fair chance it will be making great games for years to come.

Publishers are often at least as bewildered as developers when their purchases fail to deliver. Sometimes, as with Microsoft's $377 million buying of Rare, even a neutral observer wonders what was in the water. But often both the creatives and their new management do appear committed to making it work.

Does it matter to the wider industry that good companies too often fail after acquisition? Game development may not seem so reliant on the talents of mercurial creative renegades anymore. To that end, the loss of the UK development *mittelstand* doesn't foreshadow the demise of UK games development.

That said, many great games are still driven through by key individuals. And with a few notable exceptions (*The Sims* is one, though again hardly typical), most of today's best franchises – at least the non-Japanese ones – were originally developed by indies.

That great games can be made by in-house teams is not in doubt, but can they be regularly invented there? Harder to tell, even in this near-wholly-owned era.

Owain Bennallack is executive editor of *Develop*. He edited the magazine from its launch until its February 2006 issue. He has also worked at *MCV* and *Edge*, and has provided consultancy and evaluation services to several leading developers and publishers. He is also chairman of the *Develop* conference advisory board.

DESIGN DOC

by The Alpenwolf

Capture the Infinite Recursion

When I was but a small boy, I never missed a neighborhood game of Capture the Flag. Every child between the ages of five and fifteen who lived on our street would turn out for these games; the 16 and 17 year olds were much too busy trying to make an impression on the pretty blonde girl who lived at the bottom of the cul-de-sac to have any time for such a children's past time. After dinner, we would play until the sun went down and the deepening shadows made it easier to steal closer to the hidden flag or to telephone post that served as the jail where captured players waited for rescue. It was great fun.

Fifteen years later, the games of Capture the Flag took place well after sundown, as our development team took breaks from the game on which we were working and fired up the exciting new *Quake* mods that let us play as a squad against other teams from across the country over the Internet. It was great fun, especially after midnight when everyone was sufficiently lubricated with alchohol to lend an additional element of unpredictability to the online action. It was still great fun.

Fifteen years later, I find that I am still playing Capture the Flag. Or, as *Age of Conan* has it, Capture the Skull. And while I'm sure it is great fun for those who find the experience to be a relatively new one, as an increasingly jaded game designer, I find myself wondering if this is truly the best that we can do with such an incredible amount of computing horsepower and such a wealth of artistic resources at our disposal. After 25 years of increasingly sophisticated game development, how is it possible that our most expensive, most impressive electronic entertainment options still amount to little more than a virtual recreation of a simple children's game?

World of Warcraft is no stranger to relying on design that pre-dates video games for its Player-vs-Player content

Initially somewhat of an afterthought in MMOs like *World of Warcraft*, PvP has become increasingly important to MMO developers because it is the one area that does not require incessant new content in order to keep game subscribers happily occupied. Gamers chew up content much faster than it can possibly be developed, and an effective way to keep them from getting bored traversing the same terrain and dungeons over and over again is to allow them to kill each other.

> ***"How is it possible that our expensive electronic entertainment options are little more than a recreation of a simple children's game?"***

Of course, this leads to a new set of problems, as experienced veterans gank new players at will, and in their malicious boredom – or is it bored malice? – prevent those players from having the positive PvE experience that they themselves had the opportunity to enjoy.

These are real problems, but they are not insoluble. But the response to them has been indicative of the lack of forethought that has plagued PvP design from the beginning of the MMO era, as the MMO designers have taken a route that is diametrically opposed to the one that was preferred by the designers of the 3D shooter era. Led by the success of John Carmack's insightful decision to allow the gamers to greatly modify *Quake*, the designers of the 3D shooter era embraced the involvement of the player community and allowed them to modify their games until they were almost unrecognisablse. The result was an explosion of creativity that not only increased the enthusiasm for multiplayer action, but actually led to the development of several groundbreaking game series.

The MMO designers, on the other hand, spend an incredible amount of time and resources attempting to control the player community. While there is a great deal of lip service given to the idea of making constructive use of the players involved in the game, the reality is that it amounts to little more than an online suggestion box in the form of the game forums. New MMOs such as *Age of Conan* and *Warhammer Online* do allow the players' actions to somewhat influence their environment, but they remain devoid of mechanisms that permit players who have demonstrated their trustworthiness the ability to modify the actual PvP experience or even to influence the actions of players more interested in ruining the game experience for others instead of enhancing it.

Until mechanisms that take advantage of the creative and constructive instincts of the player community are incorporated, it is likely that MMO PvP will remain little more than a pale shadow of the multiplayer action available in other game genres. Until the concepts of strategy, tactics, and team play have genuine relevance to PvP, MMO gamers will be stuck continuing to play yet another iteration of Capture the [insert genre-appropriate item here].

The Alpenwolf is a professional game designer who has been active in the industry for 17 years and designed games for some of the largest American and Japanese publishers. He has been known to visit Ironforge in the company of a large white wolf. design@alpenwolf.com

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SHERIDANS

Whose content is it, anyway?

User-generated content is the new buzzword, but the law has some catching up to do, says **Tahir Basheer**…

Tahir Basheer *is a partner at Sheridans, the entertainment law firm. tbasheer@sheridans.co.uk*

User-generated content (UGC) is hot property – but exactly whose remains an issue. By shifting control from traditional content owners to consumers, UGC changes how business is done, and in turn the legal practices that serve as business' foundations. UGC can fuel explosive growth and lucrative revenues; consider $1.65 billion Google paid for YouTube. People are paying for UGC, too – the trading of virtual in-game assets is worth an estimated $1bn.

Surprising then that the legal standing of UGC is still in flux, with issues of ownership, copyright, and the responsibility for offensive or libellous remarks not yet entirely decided, certainly not on a global basis.

OPEN AND CLOSED CASES

Games are at the vanguard of exploring these issues. *The Sims* and *Ultima Online* exploited UGC back in the 1990s. Now UGC is central to the gameplay of upcoming titles like *Spore* and *LittleBigPlanet*, while Microsoft's Xbox Live Community Games will enable users to upload and sell games they create to other Xbox owners, retaining 70 per cent of revenues

Microsoft has decided content creators using its iTunes-meets-YouTube marketplace will retain full rights over their products, but ownership isn't always so clear-cut.

Companies may try to claim ownership of UGC with End User Licence Agreements (EULA), but this can prompt a backlash from consumers, as MTV and MySpace have previously discovered. Yet while such moves might seem draconian, allowing virtual property rights for UGC also raises odd questions. What if a publisher turns an online game off, denying users' access to their assets?

Virtual game worlds have been at the forefront of exploring and enforcing these rights using the EULA as a legal framework, and have evolved the concept of Closed and Open Worlds:

- Closed World. Considered a game space, like that of *World of Warcraft*, and as such not subject to real world laws. There is no sense of private property, since the virtual world is wholly owned by the developer. The 'game gods' can shut down a player's account and confiscate their virtual property.
- Open World. In titles like Second Life, the barrier between real and virtual is porous, and so the question of rights and obligations is more difficult to resolve in favour of EULA control. Players retain certain ownership rights to their creations, and may be considered the owner to some or all of the intellectual property involved and created by them.

In most jurisdictions, the courts have not yet decided as to any difference of ownership of virtual assets in 'open worlds' or 'closed worlds'. This will change, as courts hear various virtual property cases involving infringement and theft.

OTHER RIGHTS AND WRONGS

Other legal issues raised by UGC include potential invasion of privacy, and copyright infringement, whether it be the copying or exploitation of other game users' content or UGC that infringes trademarks and other intellectual property rights.

In the UK, the Electronic Commerce (EC Directive) Regulations 2002 introduced limits on the liability of service providers for unlawful information that they carry or store. Different territories, such as France and the US, take slightly different views. Companies can and must make their own provisions; YouTube's Terms of Use and Community Guidelines are designed to reduce the risk of YouTube being held liable for content uploaded by users, and it frequently removes offending material from its site.

Vigilance must be the watchword for any company wanting to harness the creativity of their users, without infringing the rights of others.

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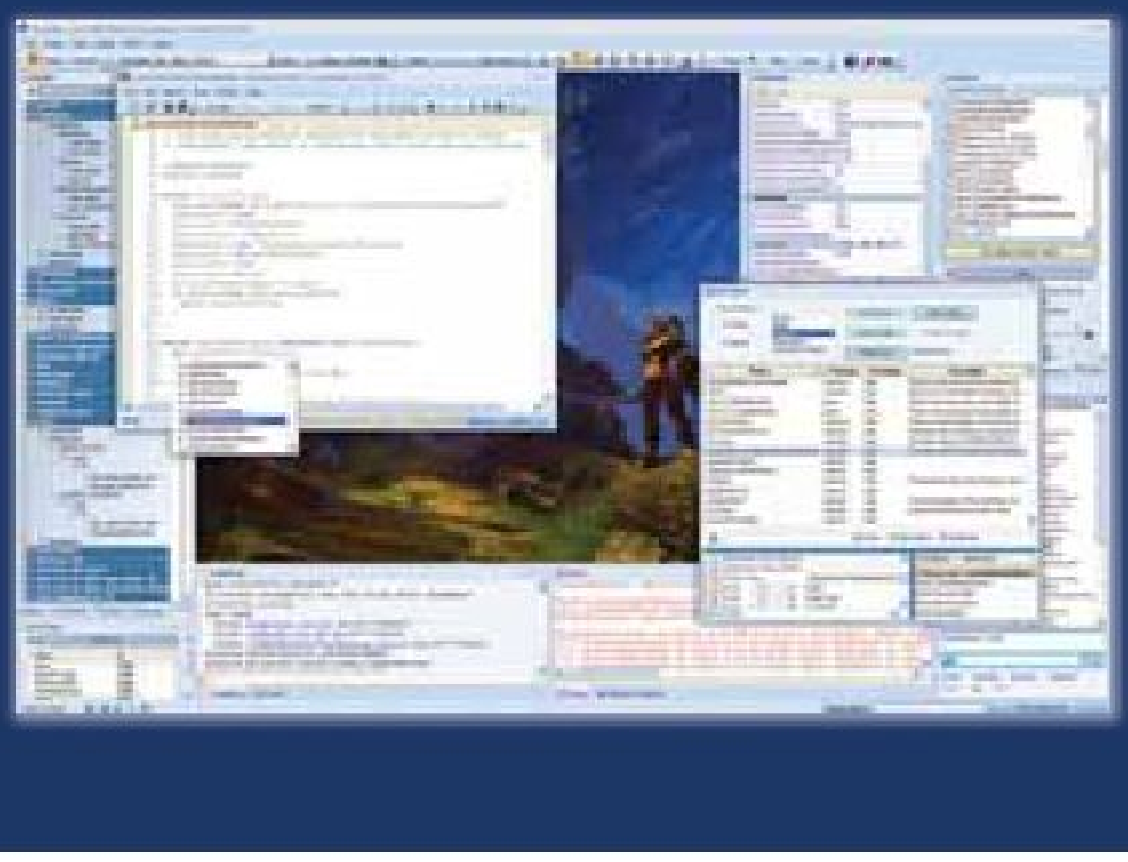

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GREATBRITISHGAMES

Worms

Rick Gibson unearths the history of a perennial Britsoft classic that has been going strong for over a decade…

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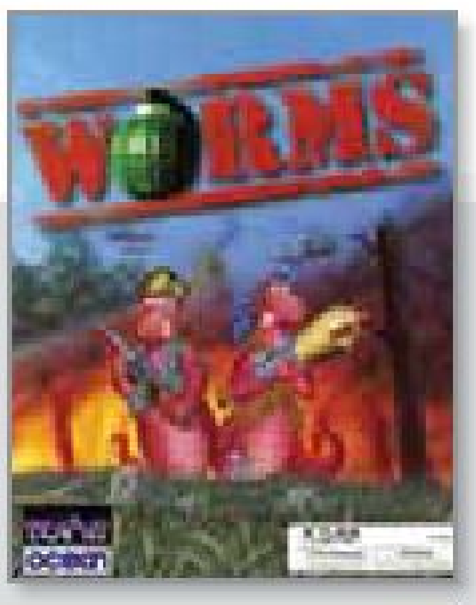


ESTIMATED TOTAL UNIT SALES:

13 million (console and PC)

NUMBER OF ITERATIONS:

11 major iterations, two spin-offs

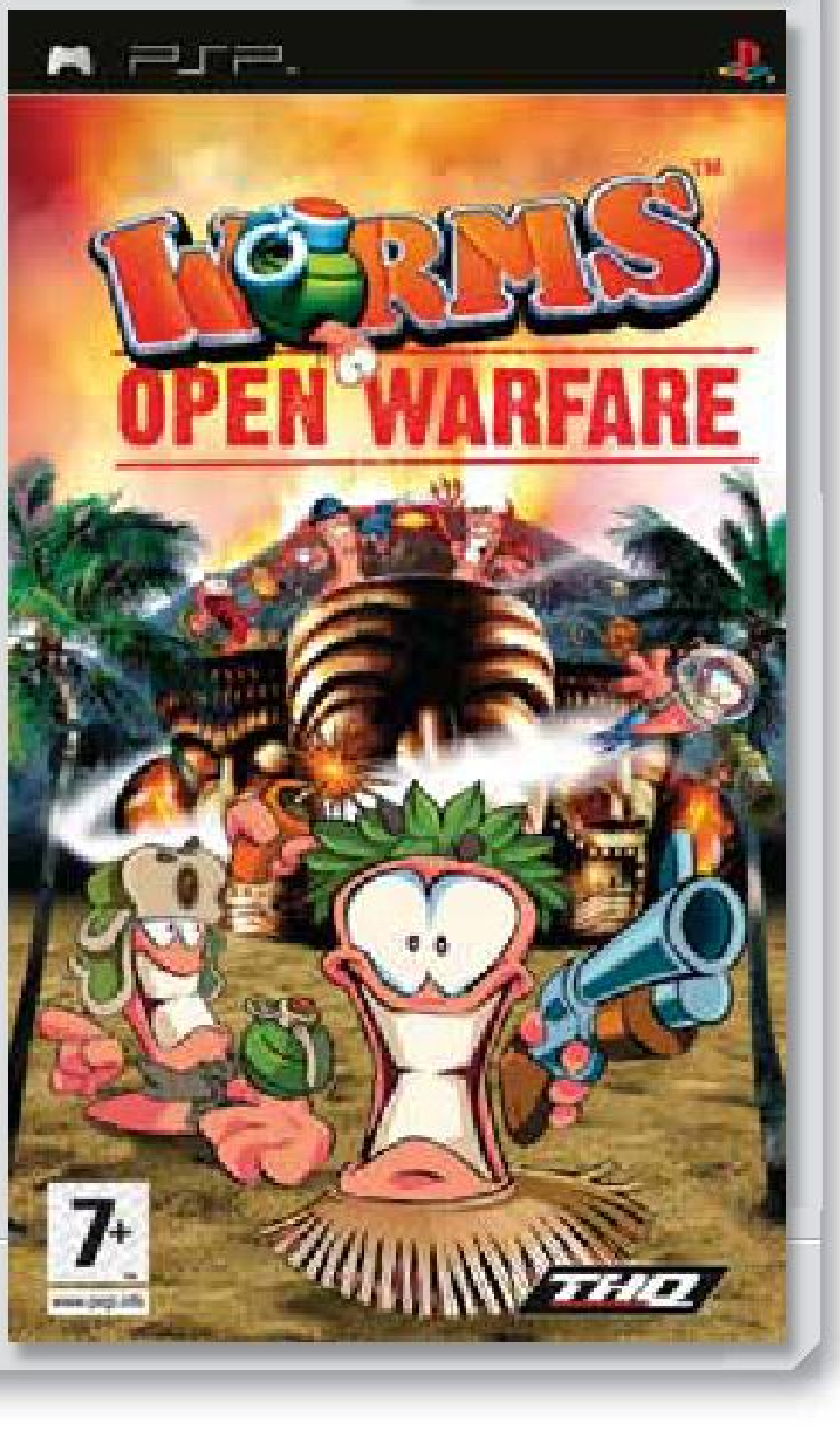
GAME RELEASE TIMELINE

1995: *Worms (Amiga)*
1995: *Worms Reinforcements (DOS)*
1996: *Worms United*
1998: *Worms 2*
1999: *Worms Armageddon*
2001: *Worms World Party*
2002: *Worms Blast*
2003: *Worms 3D*
2004: *Worms Forts Under Siege*
2005: *Worms 4 Mayhem*
2006: *Worms Open Warfare*
2007: *Worms* (XBLA)
2007: *Worms Open Warfare*
2008: *Worms: A Space Oddity*

OWNERSHIP HISTORY

1987: 17Bit Software formed within Microbyte
1990: Team 17 formed out of initial team

CREATOR: Andy Davidson



GAME INCEPTION AND GROWTH

The original *Worms* was designed by lone programmer Andy Davidson in his bedroom, and the first concept, called 'Artillery', did not feature worms at all but soldiers and tanks. Its creator entered the game, now called 'Wormage', into a competition run by *Amiga Format* magazine, where it failed to make an impact. Undeterred, Davidson then took it to the European Computer Trade Show in London in 1994, and showed it to a producer from Team 17, who agreed to develop and publish it under the title *Worms*.

The original game featured turn-based combat on a fully deformable landscape, with touches of quirky humour, strong animation and characterisation. It was darker and slightly less cartoony than later sequels, but had the trademark 'bloke-ish' humour characteristic of its target audience, a feature that helped its sales perform well. It also featured strange, comedic weapons in an unpredictable terrain that changed with each game session, which encouraged repeat play and acted as a hook for sequels. The game sold well on Amiga, and was later published by Ocean on a number of additional platforms.

For the second game, the teams split into two, one working on the final Amiga version and the other working on the most viable of new platforms, the PC and other formats. This split was the result of an amicable difference of opinion between the originator Davidson and the Team 17 producers. Davidson's version was released onto the dying Amiga format, and sold barely 5,000 units. *Worms Reinforcements* did better on PC and succeeded in recruiting a community of

Worms addicts that suggested new gameplay elements and kept the faith between instalments, encouraged by Team 17's community site The Allotment. *Worms 2* featured a reworked game engine, support for better resolution graphics and it introduced both customisation, allowing players to change many of the game's settings, and some limited online play to the game. The graphical style also changed slightly, becoming more cartoony and seemingly targeting a younger audience. Nevertheless, it sold well.

With the delayed publication of *Worms Armageddon* in 1999, however, the game took a step forwards, adding 33 missions in a wider campaign, deathmatch features and more extensive online play which, while it was abused by some, was popular. Reductions in customisation and some persistent problems with the online play caused further rifts with the game's fans. Before *Armageddon* was released, Davidson, having operated at arm's length from the company for some time after disputes over the game's direction, formally left the company to pursue other projects.

The developer made the leap to 3D in 2003, producing a game with 3D terrain, more detailed missions and levels and a decidedly more youthful feel. Although a more approachable style of game, the game did not sell as well as previous versions, having alienated its core fans. Some of the game's original appeal – its focus on gameplay and humour – were downplayed in this version, which pushed graphics to the fore.

However, the later handheld, 2D versions of the game have been a return to form for the company. The success of *Worms Open Warfare* on DS and PSP stimulated a sequel, and a deal with Microsoft Games Studios transferred *Worms* very successfully to Xbox Live Arcade. In 2008, a version of *Worms* (subtitled *A Space Oddity*) launched on the Wii, with a simplified, but only moderately well reviewed version of the franchise.

COMPANY INCEPTION AND GROWTH

17Bit software was formed in 1987 within the Microbyte retail chain to produce and publish games for the Amiga platform, the market leading platform of the day.

Initially, the company was largely staffed by freelancers but in 1990, Team 17 coalesced more formally, separating from Microbyte to form a new company. Its first game was *Full Contact* which topped the format's charts for weeks. Following this success, a run of popular games followed including *Alien Breed*, *Assassin*, *Project-X* and *Body Blows*. A collaboration with Ocean software saw their reach extend to more platforms, driving better global sales. For a time, Team 17 also acted as a publisher for small UK developers such as Audios and Eclipse.

The *Worms* franchise began with a lucky break for Team 17, finding a random programmer at a trade show who had a game concept that would hook millions of players. The company was doing well before the game was published, but this title took the company's revenues to a new level. It did, however, face a few bumps along the way in the middle of the current decade. Acclaim, its partner of a previous game and funder of the *Under Siege* version of *Worms*, suddenly collapsed in 2004, leaving Team 17 with a hole in its finances – and more set-backs came when *Worms 3D* failed to sell as well as hoped.

Despite offers to purchase both the company and the IP, Team 17 has remained a privately owned company and is still based in West Yorkshire. Its fortunes have revived with the success of *Worms* games based on the original game concept, with its releases on new digital platforms such as Xbox Live Arcade and its success in winning 'work for hire' from long term partners to work on games such as *Lemmings* on PSP.

ANALYSIS

Worms is an interesting case study because it is a rare example of a prominent UK IP that was developed from scratch to become an triple-A seller, which then peaked in sales, declined and was finally successfully resurrected to perform well on smaller platforms. The franchise has been a success in spite of working with many different publishers, whose number could have muddied brand, distribution and audience. The company had a track record of developing many good games before *Worms*, and had nurtured relationships with publisher partners that allowed it to secure better distribution as the franchise grew.

> ***"The franchise has been a success in spite of working with many different publishers, whose number could have muddied brand and audience…"***

Worms was also the product of a generation of games consoles that were cheap to develop for and whose number and spread allowed developers to specialise in, and get the best out of, individual platforms, even in an immature publishing market. *Worms*' decline as a franchise was triggered by succumbing to the temptation to go 3D, which ironically has historically been a trigger for other franchises' sales to soar. The game's fortunes were ultimately in the hands of a classic '90s gamer demographic who remained loyal to a simple, addictive game with few pretensions towards being graphically impressive. The game flourished as Team 17 marketed to their customer base, allowing them to buy into the game through community features and gameplay suggestions. The game began to wane as it abandoned some of its founding principles of humour, re-playability, lo-fi graphics and imaginative weaponry; features cherished by its core user group. No doubt its renewed success on new platforms has in part attracted back some of its original players, although their launch on new platforms probably means that the game is reaching new audiences.

Team 17 has resolutely stayed independent, even through bad patches where the company's future was in doubt. This survival has undoubtedly been assured by some fairly level-headed management and some financial decisions that were beneficial in the long term, particularly when the company faced shortfalls due to lack of projects or a defunct publisher. Team 17 has also held onto its IP so tightly that no publisher has taken rights away from the company, and this remains the case today. The IP has in many ways assisted the company to reach its position now as one of the UK's leading independent developers, although it is fair to say that its portfolio of IP is not at all balanced, listing heavily in the direction of its one major franchise.

Despite its success with original IP, Team 17 now is notable in demonstrating the trend that is seeing major UK developers turn towards work for hire to maintain their scale. The future success of its IPs, including *Worms*, will be reliant on selling well on new platforms such as handheld and the online console games platforms such as Xbox Live Arcade. As publishers turn towards demanding ownership or at least control of all IP in their portfolios, it will be interesting to see whether Team 17's approach can be maintained and if future iterations and new brands will reach as wide an audience as earlier versions released when publishers exerted less of a stranglehold on new IP.

CONCLUSIONS

- *Worms* succeeded through a combination of quirky humour, unique characterisation, replay value and careful marketing towards its user base.
- A very loyal fan base helped the game grow in sales, and web-based community features were instrumental in hooking more players.
- The IP has never been sold or licensed for more than a limited time to third parties, allowing the developer to harvest significant long-term value from its property.
- The developer has been well managed by executives who value building relationships while keeping a firm hold of proprietary IP.
- Despite the success of *Worms* and other own-IP games, Team 17 is inexorably moving towards becoming a work-for-hire developer

Games Investor Consulting is a specialist games industry consultancy founded in 2003 to provide independent games research and corporate finance consulting to the games industry and financial community. Headed by Rick Gibson and Nick Gibson, GIC is one of the industry's most trusted sources for market intelligence, has generated a number of industry-standard reports, and has consulted on games strategy and research for numerous games and media companies as well as trade and governmental bodies.

Games Media Awards finalists revealed – who gets your vote?

Hey developers, it's time to reward the people who write about your games and pick favourites for 2008's GMAs

If you're also a reader of *Develop*'s sister magazine *MCV*, you may know that last year our publisher Intent Media debuted the Games Media Awards – the first event that rewards the people who write about games in the consumer press.

For 2008, the awards have grown in stature, with a more focused list of nominees, but an even wider voting catchment. That's right, we're opening up the voting so that developers can have their say and finally help reward the journalists who play, judge and write about their games.

The finalists, listed in full to the right, represent the best of the games media in print and online, including specialist and mainstream outlets. So now's your chance to help determine who will win on the big night – October 16th at Jongleurs Comedy Club in Camden.

Voting is open to all *Develop* readers. Just have a think and send your choices to gma@intentmedia.co.uk.

If you only have a view on one category, just vote in that category. Ignore the others, that's fine.

We want the industry *en masse* to champion their favourites: their top scribes, their must-read mags and their can't-miss websites.

Basically, just get involved. You know you want to – finally you can let the media know what you really think of them. In a good way. **gma@intentmedia.co.uk**

GMA FINALISTS

GAMES MAGAZINE
Edge
Gamesmaster
Games TM
Official Nintendo Magazine
Official PlayStation Magazine
PC Gamer
Xbox World

GAMES WEBSITE
C&VG
Eurogamer
GameSpot UK
IGN UK
Kikizo
Rock, Paper, Shotgun
Videogaming 24/7

SPECIALIST GAMES WRITER – PRINT
Jon Blyth (PC Zone)
Tom Francis (PC Gamer)
Rick Porter (Games TM)
Joel Snape (PlayStation Official Magazine)
Ben Talbot (Official Xbox Magazine)
Alex Wiltshire (Edge)

SPECIALIST GAMES WRITER – ONLINE
Tom Bramwell (Eurogamer)
Guy Cocker (GameSpot)
Matt Cundy (Games Radar)
Gary Cutlack (Shiny Media)
Pat Garratt (VG 24/7)
Ellie Gibson (Eurogamer)

MAINSTREAM MAGAZINE GAMES WRITER
Sponsored by
Rory Buckeridge (Zoo/Nuts)
Tom Dunmore (Stuff)
David McComb (Empire)
Simon Munk (FHM)
Matt Yeo (Toxic)

NATIONAL NEWSPAPER – BEST GAMES COVERAGE
Guardian
Times
Daily Telegraph
Observer
Independent
Sun
Star

REGIONAL GAMES COLUMNIST
Dave Cook (Scotsman)*
Steven Fox (Metro)
Ewan Ross (Liverpool Echo)
Derek Uchman (Dundee Post)
Ross Wilkinson (Press Association)

** We know Scotland isn't a region. But this seemed the best home for Mr Cook. Plus we look forward to people getting all narky about it.*

GAMES BROADCAST
Click
Gadget Show
Games Night (Sky/X.league.tv)
GameSpot UK Podcast
Johnny Minkley (Radio 1)
One Life Left (Resonance FM)

RISING STAR
Sponsored by
Luke Anderson (Gamespot)
Michael Gapper (Xbox World 360)
Simon Miller (X360)
Chris Scullion (Official Nintendo Magazine)
Richard Stanton (Edge)
Ed Zitron (PC Zone)

SEND YOUR VOTES TO GMA@INTENTMEDIA.CO.UK

GOLD SPONSORS

GAMES MEDIA LEGEND
The recipient of the Games Media Legend award will be announced on the night after consultation with a panel of industry and media experts. There is no voting on this category.

PAPER CHASE IS ON
Observant readers might have noted that one category has changed slightly. The National Newspaper Games Writer award has become the National Newspaper – Best Games Coverage award. In other words, we're rewarding the titles, not the individuals.

It was felt that in many cases these days, a paper's games coverage is provided by teams of people, and can include contributions from the in-house news team and features desk. So, one of the finalists listed will win as a collective – and then fight over who gets to keep the trophy.

TRADE TICKETS
Entry to the Games Media Awards is free to the media, but there are a limited number of trade tickets available. £75 includes three comedians, free booze and food. To register your interest, email dave.roberts@intentmedia.co.uk

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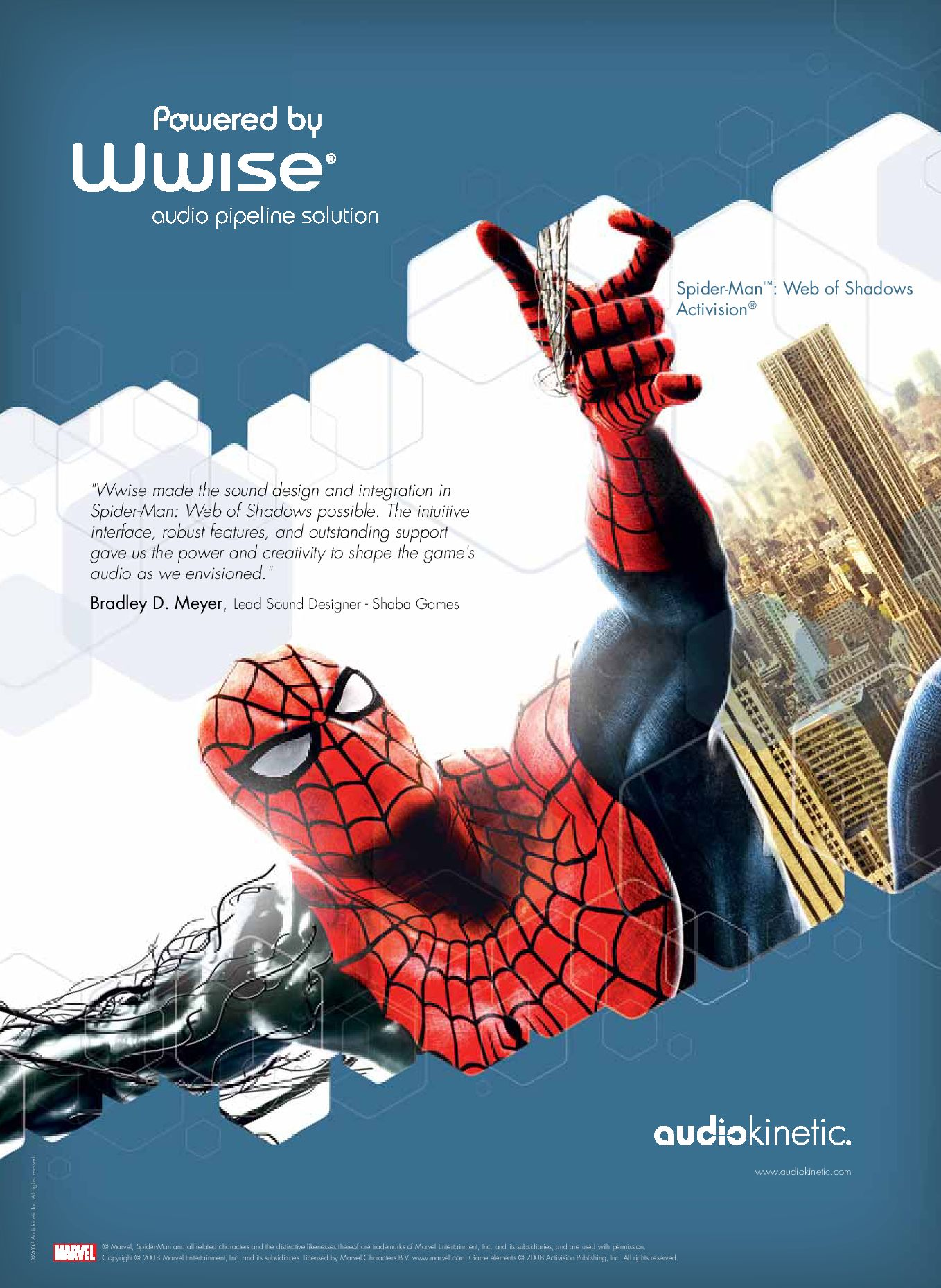

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Bradley D. Meyer, Lead Sound Designer - Shaba Games

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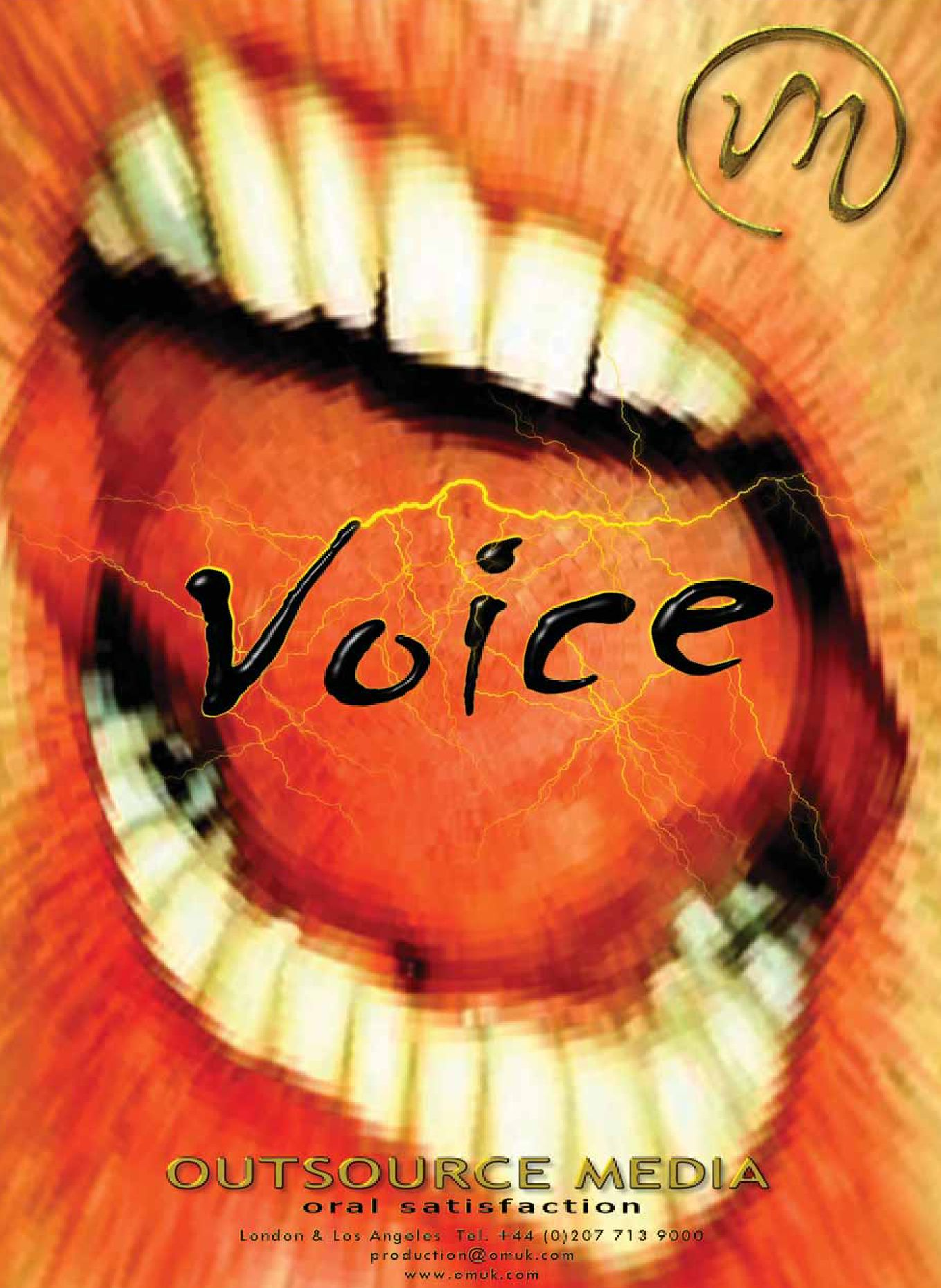

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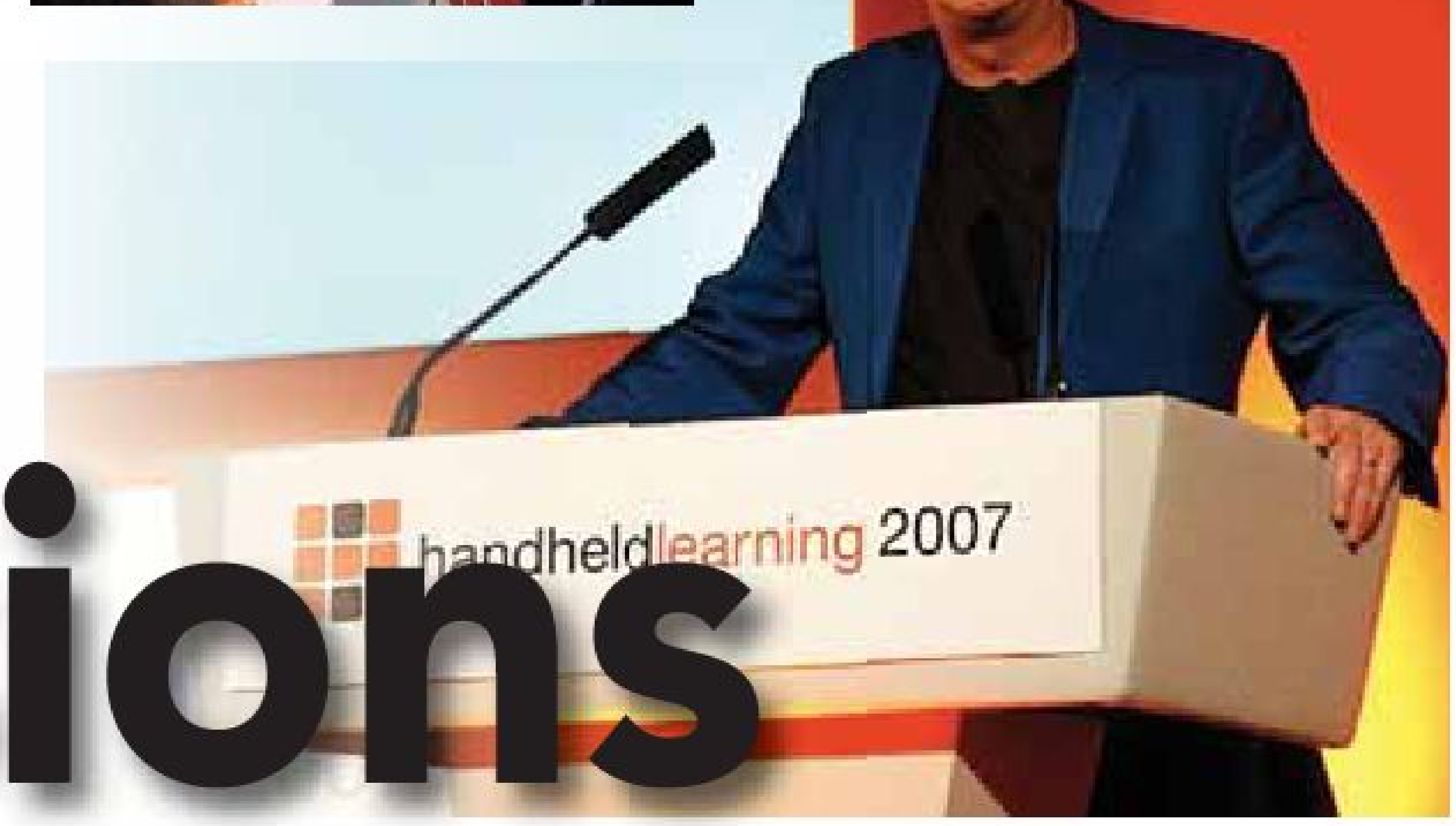

Handy Discussions

Develop offers up a preview of next month's handheld-gaming-meets-educaton event, Handheld Learning…

Now in its fourth year, the Handheld Learning conference is a unique event that pinpoints a sweet spot where gaming as a cultural force overlaps with education – and looks at ways the industry can support and utilise the crossover.

Taking place next month from October 13th to 15th The Brewery at the Barbican, London, some 1,000 representatives from across a variety of fields are expected to attend. The conference is put together by Handheld Learning, which focuses on learning and teaching practice enhanced by the use of mobile and ubiquitous technologies.

For the past four years, the organisation has provided research into ways handheld technologies can integrate with education.

"In an age where more people on our planet have mobile phones than don't and where mobile phones and handheld entertainment devices outsell laptop and desktop computers by 4:1 we believe there are huge opportunities to make transformational improvements in learning that will affect everyone," says the organisation.

Speakers are suitably diverse including popular science writer and *Everything Bad is Good For You* author Steven Berlin Johnson, social media scientist Danah Boyd, former Xerox Corp chief scientist John Seely Brown, writer Marc Prensky, learning visionary Stephen Heppell, Futurelab research director Keri Facer, mobile learning guru Mike Sharples and MIT's chief learning architect, David Cavallo, will join Andrew Pinder, CBE, chairman of Becta.

For details on how to attend, go to www.handheldlearning2008.com

EVENT TIMETABLE

MONDAY OCTOBER 13TH: This day is free entry for the general public, accompanied minors, teachers and employers.
Three sessions run from 13:00 to 16:30: Next Generation Learning; Learners' Y Factor (showcasing work done by six to 16 year olds on handheld platforms, hosted by Johnny Ball); Pecha Kucha for 21st Century Educators

TUESDAY, OCTOBER 14TH:

09:30:	Industry Announcements
09:45:	Welcome & Introduction
10:00:	Opening Address: Andrew Pinder, chairman, Becta
10:20:	Steven Berlin Johnson, cultural critic & writer
11:00:	Break
11:30:	Laurie O'Donnell, director of learning and technology, Learning & Teaching Scotland
12:15:	Danah Boyd, social media scientist
14:30 - 17:30:	Afternoon conference session: Re-imagining Teaching in the 21st Century. Looking at how teaching will evolve over the next 25 years
14:30 - 17:30:	Afternoon breakout sessions: Game On (looking at the role games consoles have to play in the classroom); Virtual Worlds and Social Networks; The MoLeNET showcase

WEDNESDAY, OCTOBER 15TH:

9:30 - 13.00:	Morning conference session: Embrace or be Banned? A discussion looking at the challenges facing handheld learning and how it can develop over the next five years. Participants: Matt Locke, commissioning editor, Channel 4 Education; Richard Warmsley, head of Beyond Voice, T-Mobile; chaired by Steve Moore, Policy Unplugged
9:30 - 13.00:	Morning breakout sessions: Spotlight Scotland; Inventing Future Schools
14:30 - 16:00:	Afternoon conference session: Three of the best. A session examining three of the most innovative initiatives and host a discussion to identify what makes them so special. Featured: David Whyley - Learning2Go, Wolverhampton; Dr Kyle Dickson, Adams Center for Teaching and Learning, Abilene Christian University, Texas; Derek Robertson, Consolarium, Learning and Teaching Scotland.
14:30 - 16:00:	Afternoon breakout sessions: Developing Teachers for the 21st Century; School Report; Speakers Bingo; The St. Mary's miniBooks for Learning Project
16:00 - 16:30:	End of conference, closing Q&A with 'very special guest' and prize draw

GAMES UNIVERSITY OPEN DAYS

A listing of all the open days run by universities currently offering games development-related courses…

University of Abertay Dundee	October 15th
Aberystwyth	October 15th
Anglia Ruskin	October 11th, November 22nd
Birmingham City University	October 3rd & 4th
University of Bradford	October 4th
Brighton	October 18th
Coventry University	October 11th, October 25th
University of Derby	October 11th, October 31st, November 14th, November 29th
University of East London	September 3rd, October 15th
University of Essex	September 20th, October 29th
University of Glamorgan	September 18th, October 25th, November 15th
University of Greenwich	September 13th, October 18th
University of Hertfordshire	October 4th & 5th
University of Huddersfield	September 20th, October 29th
University of Hull	October 4th
Kingston University	October 4th, October 18th, February 21st '09, March 28th '09
Leeds Met	September 27th & 28th
University of Lincoln	September 27th, October 18th, November 15th, January 17th 2009, July 8th 2009
Newcastle University	September 27th
Northumbria University	October 11th
Nottingham Trent University	September 20th, October 18th
University of Plymouth	October 18th, June 17th 2009
Plymouth College of Art and Design	September 27th, November 19th, Jan 24th 2009, Feb 25th 2009
University of Portsmouth	September 17th, October 15th & 25th, November 12th
Sheffield Hallam University	October 5th, 18th & 19th
Southampton Solent University	October 15th, 24th & 25th, November 14th & 15th
Staffordshire University	Sept 27th, Oct 19th, Nov 15th
University of Teesside	October 11th & 15th
University of Westminster	October 18th
University of the West of England	October 11th, November 22nd
University of Wolverhampton	September 16th, November 8th

All data supplied by UCAS website. If you'd like to add or amend your institution's entry, please contact ed.fear@intentmedia.co.uk

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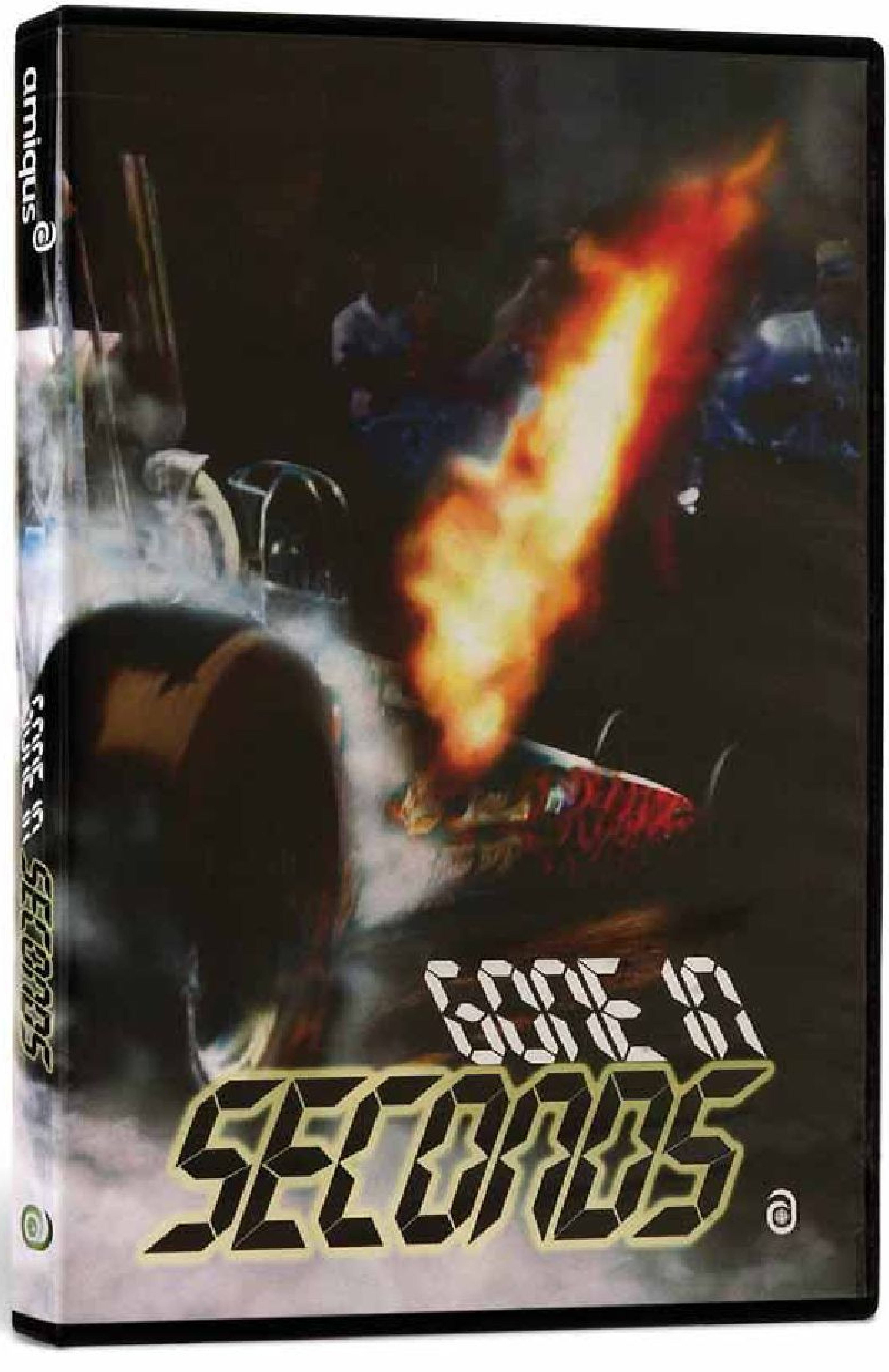

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THE DEALS

ZERO-PHYSX
Graphics specialist Futuremark has confirmed that it will use its 3DMark benchmark technology to build a new 3D action game and is using Nvidia's PhysX for in-game physics. The game is a multiplayer first-person shooter where players fight in zero gravity.
www.futuremark.com

TURBINES GO HAVOK
Massachusetts-based MMO developer Turbine has struck a deal to use Havok's middleware on upcoming projects. The studio, which recently secured $40 million in funding, has selected Havok Physics, Havok Animation and Havok Behaviour to drive its forthcoming PC and console MMOs.
www.turbine.com

BIGGERWORLD
Online games middleware firm BigWorld has established a direct local presence in the European market.
It's appointed a new business development manager for Europe and Russia, Mike Allenson – most recently biz dev director at Moscow-based Nival Interactive – and is now looking to forging closer deals with studios across the territory.
www.bigworldgames.com

...EVEN BIGGERWORLD
And on the subject of BigWorld, its Technology Suite has scored another licensee: Russia-based Cybertime System will use the online tech for an MMO virtual world called *Cyber Town*.
Cybertime specialises in the creation of virtual cities in real time environments, and plans to recreate entire city infrastructures online.
Yeketerinburg and Moscow will be the first cities to go online, with other cities such as London, Tokyo and New York planned for the future.
www.online-city.ru

VICIOUS CODEBASE
American developer Frozen Codebase has signed a deal to use the Vicious Engine on multiple upcoming titles.
The studio will be utilising the engine on all of its three current projects – Xbox Live Arcade game *Zombie Wranglers* for Sierra Online, Konami's *Fresco Beach* for WiiWare, and one unannounced title.
www.frozencodebase.com

DEVELOPER CHART

(JUNE 29th – JULY 26th)

1

→←

LAST MONTH 1

NINTENDO

Wii
15p
L Punch

BEST SELLING GAME: 🇯🇵
WII FIT

In Kabbalah, the Hall of Guf is the waiting place for souls yet to be born, and only when it empties will the Messiah appear. In journalism, there's a similar concept – albeit spelt with an extra 'f' – that holds all the words to be written about *Wii Fit*, and ours is empty. Better tidy up: we've got company coming.

Wii

2

→←

LAST MONTH 2

TRAVELLER'S TALES

BEST SELLING GAME: 🇬🇧
LEGO INDIANA JONES: ORIGINAL ADVENTURES

Another month, another indication that Traveller's Tales can turn any film property into steaming piles of money. We've said it (more than) once, and we'll say it again (more than once): you're missing a trick until you make *Legolly Blonde*, *Lego Calendar Girls* and *Lego Neon Genesis Evangelion*, guys.

WII, PS2, DS, XB360, PS3, PSP, PC

3

↑

LAST MONTH 9

DIGITAL ILLUSIONS

BEST SELLING GAME: 🇸🇪
BATTLEFIELD: BAD COMPANY

The Swedish boys and girls at DICE continue their rise up the chart as their single-player take on the *Battlefield* franchise strikes a chord – and possibly a spine – with gamers. And with *Mirror's Edge* and its Generic Asian Woman on the way, don't expect them to be falling down anytime soon.

XB360, PS3

4

↑

LAST MONTH 7

SORA LTD

BEST SELLING GAME: 🇯🇵
SUPER SMASH BROS: BRAWL

Small Japanese independent Sora, formed by ex-HAL Laboratories staffer Masahiro Sakurai, allegedly borrowed staff from a startling 19 other developers in order to make *Super Smash Bros. Brawl* – but it seems to have paid off, going down a storm worldwide. Excellent upskirt potential, too.

Wii

5

↑

LAST MONTH 24

EUROCOM ENT.

eurocom
2860

BEST SELLING GAME: 🇬🇧
BEIJING 2008

We'll admit it: we just don't get the Olympics. Sure, they're a spectacle, but that doesn't answer that thorny question of 'why?' Apparently, said one BBC reporter, there won't be a dry eye in the house once that Olympic torch is extinguished. Why? Is the stadium made of onions?

XB360, PS3

OUR MONTHLY RANKING OF THE WORLD'S STUDIOS BASED ON UK GAMES SALES

CHART KEY	
NEW NEW ENTRY	↑ UP
▨ INDEPENDENT	↓ DOWN
	⇄ NO MOVE

6	↓	LAST MONTH 3	**KONAMI DIGITAL ENT.**	METAL GEAR SOLID 4: GUNS OF THE PATRIOTS	PS3	🇯🇵
7	↓	LAST MONTH 6	**SEGA**	MARIO & SONIC AT THE OLYMPIC GAMES	Wii, DS	🇯🇵
8	↑	LAST MONTH 20	**PAM DEVELOPMENT**	TOP SPIN 3	XB360, PS3, DS, Wii	🇫🇷
9	↑	LAST MONTH 43	**VICARIOUS VISIONS**	GUITAR HERO: ON TOUR	DS	🇺🇸
10	↓	LAST MONTH 4	**ROCKSTAR NORTH**	GRAND THEFT AUTO IV	XB360, PS3	🇬🇧
11	↑	LAST MONTH 12	**NEVERSOFT**	GUITAR HERO III: LEGENDS OF ROCK	Wii, PS3, XB360	🇺🇸
12	↓	LAST MONTH 11	**UBISOFT (MONTREAL)**	TOM CLANCY'S RAINBOW SIX: VEGAS 2	XB360, PS3, PC	🇨🇦
13	↑	LAST MONTH 28	**HB STUDIOS**	BIG BEACH SPORTS	Wii	🇨🇦
14	↑	LAST MONTH 63	**EPIC GAMES**	UNREAL TOURNAMENT III	XB360, PS3, PC	🇺🇸
15	↓	LAST MONTH 10	**INFINITY WARD**	CALL OF DUTY 4: MODERN WARFARE	XB360, PS3, PC, DS	🇺🇸
16	NEW	LAST MONTH -	**CHUNSOFT**	POKEMON MYSTERY DUNGEON: DARKNESS	DS	🇯🇵
17	↑	LAST MONTH 38	**HIGH MOON STUDIOS**	THE BOURNE CONSPIRACY	PS3, XB360	🇺🇸
18	↑	LAST MONTH 19	**MAXIS**	THE SIMS 2: IKEA HOME STUFF	PC	🇺🇸
19	↓	LAST MONTH 8	**EA CANADA**	FIFA 08	PS2, XB360, PS3, PSP, Wii, DS, PC	🇨🇦
20	↓	LAST MONTH 5	**CODEMASTERS**	RACE DRIVER: GRID	PS3, XB360, PC	🇬🇧

Chart Comment

So, the Olympics might be over – thank God/Allah/Dawkins for that – but the incessant celebrations and slightly overinflated praise of the suddenly-cool-to-say 'Team GB' will continue unabated. Until we remember how generally disappointed we're supposed to be about anything British, anyway, regardless of success at what is essentially a weird human version of Crufts.

But wait! There's another reason to celebrate the successes of (gnngh) Team GB: forget fourth place, the UK takes the third spot in the developers chart, with four of our studios occupying spaces in the top 20 – bested only by Japan's five medals and the US' six. Still, those xenophobic towards Canadians – i.e. rapidly most of the industry, wink wink – will be pleased to know that they have only three representatives present. Take that, you tax-break loving charlatans.

> **"Team GB takes four spots in the top 20..."**

Special mention should go to Eurocom, even if their vault to fifth position is on the back of the Olympics, and Vicarious Visions, whose portable *Guitar Hero* seems to have struck a chord (ho-ho!) with musicians on the move, even going as far as accurately emulating the crippling hand cramp that greets rookie guitarists.

Also worthy of praise should be this month's only new entry, Japanese indie Chunsoft, whose *Pokemon* spin-offs are still going down well, and Epic, who climb 49 places thanks to the Xbox 360 version of *Unreal Tournament 3*.

Ed Fear
ed.fear@intentmedia.co.uk

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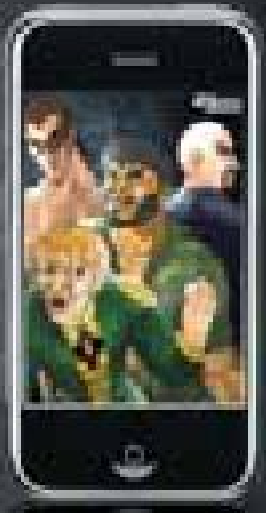

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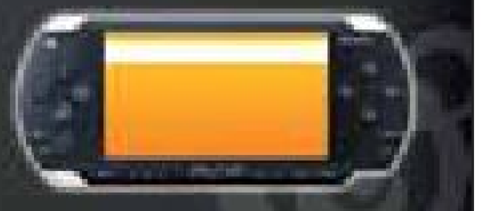

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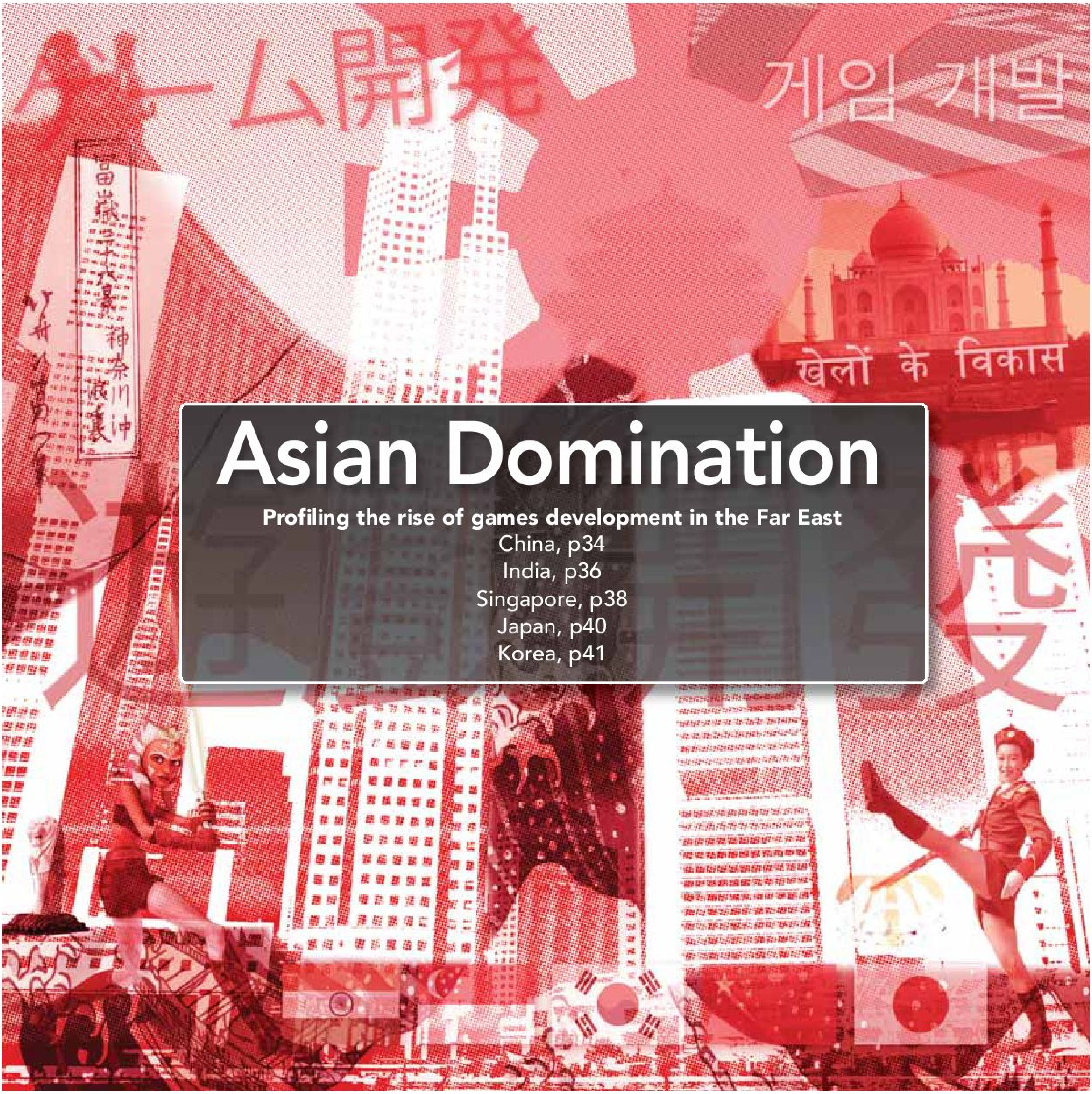
BETA

DEVELOPMENT FEATURES, INTERVIEWS, ESSAYS & MORE

> “Singapore is similar to Vancouver or Montreal ten to fifteen years ago…” p38



Asian Domination

Profiling the rise of games development in the Far East

China, p34
India, p36
Singapore, p38
Japan, p40
Korea, p41

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THE SHANGHAI

China isn't just the country with the higest population, it's also a major player in the games industry. **Lai Ke Yan** offers up a glimpse into the market…

FACTFILE

CHINA

According to Chinese research firm Niko Partners, China's 46 million gamers spent $1.7 billion on online games in 2007, up 71 per cent from 2006.

"Advanced casual and casual online games made up 21 per cent of the total, and new Flash-based casual versions of popular MMO and RTS games demonstrated the hardcore gamers' appetite to play casual games along with subscription MMOs," said the firm.

Online game revenue in China is expected to reach $2.5bn in 2008 and $6bn in 2012, for a 29 per cent compound annual growth rate in the five-year period.

Much of this activity has been driven by economic shifts. Niko's latest market report shows that China boasts a hardcore gaming community of around 14m who play online games for more than 22 hours a week – they play online, LAN, and single-player offline PC games. And not just at the country's 185,000 Internet cafés, but also increasingly on their PCs at home, thanks to falling hardware prices and higher disposable income.

And while most of the consumer games activity is around PC games, more and more are turning to imported consoles – albeit illegally imported Wiis, 360s, PS2 and PS3s. According to Niko Partners console unit sales hit 2.48 million units in 2007, up 75 per cent over 2006.

The region's notorious piracy still an issue for packaged goods, which is challenged by digital downloads and counterfeits, but in the face of this offline PC game sales were up 56 per cent in 2007 – which shows an increasing sophistication and savvy amongst consumers, according to Niko, whose report said "Chinese gamers are showing that they like to buy the legitimate copies to ensure quality and to get customer support."

www.nikopartners.com

Shanghai is not a stranger to the world. Being the biggest city in China, and the largest commercial and financial centre in the mainland of the country, it has long been regarded as one of the most international cities in the Asian region, and the gateway to China. However, these days, Shanghai is getting a new reputation – the Gaming City of China.

To feel the hype of the gaming industry, you just need to come to the city in July when ChinaJoy, the China Digital Entertainment Expo & Conference, is happening. Starting from 2003, this gaming expo has expanded at an amazing rate, and is developing into a world-class game event.

This year, ChinaJoy was held in Shanghai New International Expo Centre in July. It drew nearly 200 game developers, publishers and operators both local and international, with 110,000 visitors over 3 days. Participating publishers included those international big names such as EA, Ubisoft, Blizzard, and Epic, and local giants like Shanda and The 9.

"China's gaming industry started with outsourcing," comments Yang Xue Fei, the senior editor of the TV Game magazine, China's biggest publication for console games.

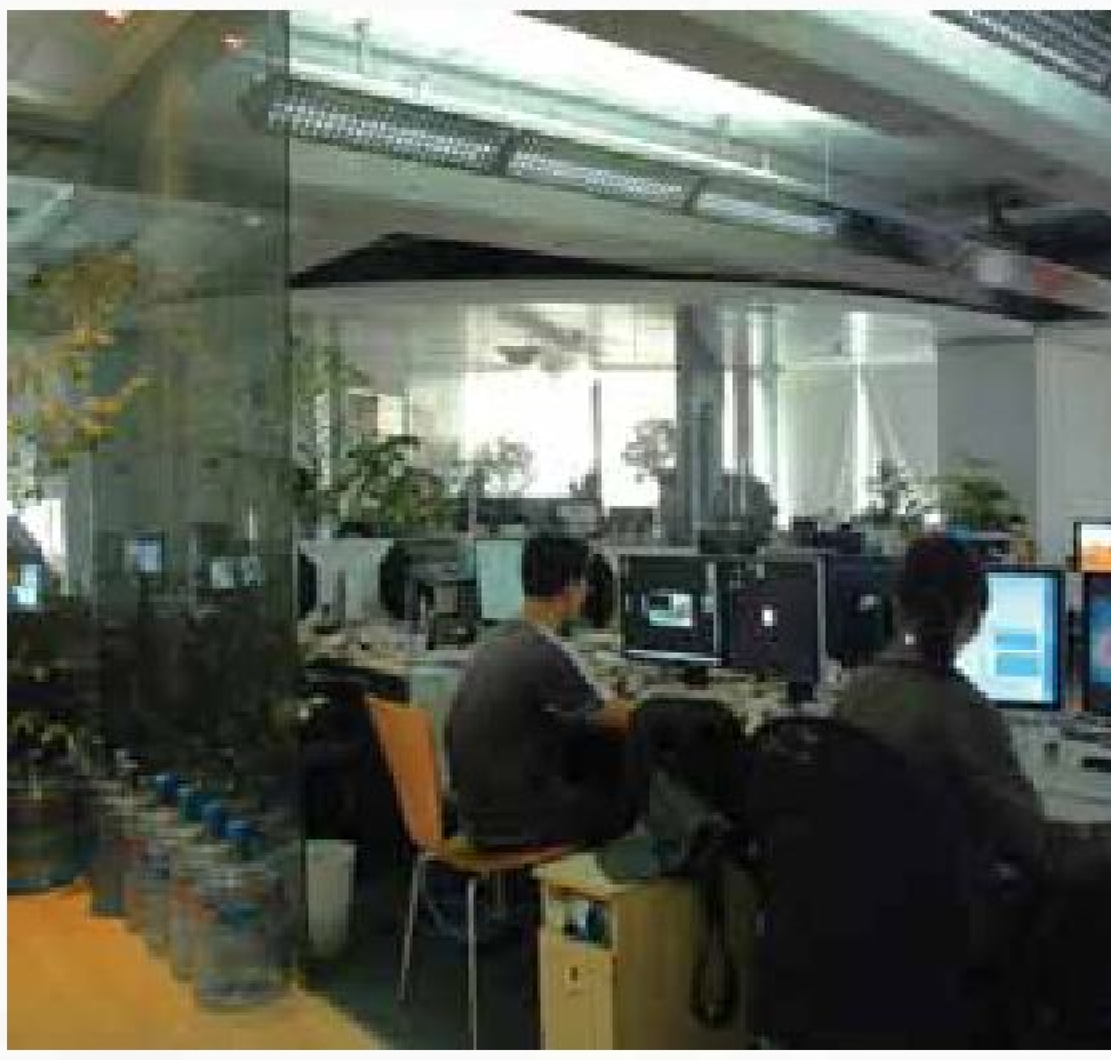
> "The Chinese gaming landscape would be completely different today without Ubisoft setting up a studio in Shanghai…"

As Yan observes, outsourcing in China began in the early '90s when overseas developers, mainly Japanese, tapped into local talents. The whole '90s witnessed China's gaming industry developing slowly and gradually.

Then the industry experienced a new era in 21st Century. Since 2000, more than 300 overseas gaming companies have established studios or offices in Shanghai.

The coming of international gaming giants such as Ubisoft, EA, Konami and Blizzard has not only levelled up the whole Chinese gaming industry, but also created a favorable environment for the growth of local game developers.

Today, Shanghai has become the headquarters and development base for those biggest local Chinese gaming companies, such as Shanda, The 9, and Giant, which have paved the way for online gaming in the country.



The buzz surrounding the gaming industry goes hand-in-hand with the rapid-development of educational programs targeting future industry talents. In 2002, Shanghai University initiated the country's first game-related course, followed by others including those at the East China Normal University. At the same time, collaborations between international major developers and local universities have been established. A noticeable example is the close relationship between Ubisoft Shanghai studio and Jiao Tong University, the nation's top university.

According to Corinne Le Roy, the managing director of Ubisoft Shanghai, the studio has established a strategic partnership with Jiao Tong University for years. In addition to welcoming over 20 interns from the university each year, the studio organises workshops and lectures on campuses on a regular basis, and works with educators to develop practical and relevant curricula. Company visits and training forums are also held in the studio for students from the university. Currently, a professor from the university is also conducting a research project in the studio.

POWER

"We see the importance and necessity of shaping the industry and our own development through close collaboration with universities. Through this collaboration, we maintain and further strengthen our leading position in the Chinese gaming industry and are able to tap into the huge talent pools of top universities, and benefit from this relationship.

"At the same time, we believe it is crucial and meaningful for a company to contribute to academic research with real applications and we are confident about the prospect of applying the latest high-tech research achievements to the projects in Ubisoft," Le Roy tells me.

According to TV Game's Yang, Ubisoft Shanghai's opening in 1996 – when Chinese people knew very little about console games, and it was even impossible for them to find an experienced local game developer – has been key to transforming the region around him. The result has been an importing of international development practices and expertise to its Shanghai games studio.

"Ubisoft Shanghai is the West Point of the Chinese gaming industry," he says. "It is the first world-class gaming studio with complete creation and production capacity in China. It is still the only one in Shanghai today, even in China.

"The Chinese gaming landscape would be completely different today without Ubisoft setting up a studio in Shanghai."

Yang says that now a while new generation of developers have been raised by Ubisoft. One of those is Yuan Pei Sheng, the career development director at Ubisoft Shanghai. He joined Ubisoft in 1998 as a level designer, and then became producer in 2001. He has released six titles, including *Splinter Cell Double Agent* (Xbox 360), *Ghost Recon 1 & 2* (PS2) and *Rainbow Six 3* (PS2).

"Game development is driven by creativity and talent; the foundation of competition between studios is basically about people," says Yuan, who is now concentrating on refining the training and career development system in the company.

"Ubiosft started in outsourcing with three people; now we have nearly 400 in the development team."

And after over a decade co-developing titles for sister Ubisoft studios or working on established-franchises, the Shanghai team is now planning to put its name on the map with the development of new title *EndWar*.

Most recently the title, part of the Tom Clancy range, has won an E3 Game Critics Award for Best Strategy Game. It's not only the first time a console game has won in this category, but it is the first time ever a development studio in China has won any such award.

Says TV Game's Yang: "The development of the Ubisoft Shanghai studio is a reflection of how the Chinese gaming industry has evolved.

"The country's games industry has carved out a spot on the international game production scene. And it is there to stay."

www.ubisoft.com.cn

LAND OF OPPOR

India has become a hotspot for games development thanks to a fast-paced economic and cultural climate, **Michael French** discovers…

FACTFILE

INDIA

With a vital history as a talent base for outsourcing in a number of industries, it won't surprise you to hear that India's creative industry boasts a mix of animation and development companies which at times overlap and complement each other.

According to NASSCOM, India's trade body for IT and other services, the market for games development in India was estimated at $30m in 2005 and is expected to witness a compound annual growth rate of 78 per cent, reaching a value of $300m by 2009. NASSCOM says that mobile gaming will dominate the market with its share in the total Indian gaming market expected to increase from 53 per cent in 2005 to 68 per cent by 2009.

For games, key services currently outsourced in gaming include production and testing activities. But the country's animation talent base means that it's also becoming a target for art outsourcing too. The size of the Indian animation (which includes production of animated films) market in India was estimated at $285m in 2005 and NASSCOM says it is expected to witness a compound annual growth rate of 35 per cent and grow to $950m by 2009. The film/movies entertainment sector contributes as much as 68 percent of the total Indian animation market.

This has spurred a number of Indian companies to change their business model – many are moving from an outsourcing only business to a co-production model.

In terms of the local market, while games in the area are predominantly played on PC, India is showing the signs of a fast-accelerating games culture around consoles. Although the market is small, at 500,000 consoles (65 per cent of which are PS2s, according to SCEE, and the second largest sector being PSP at 75,000 units), signs are that Indian gamers are receptive to console games.

www.nasscom.in

Talk to anyone about the Indian games industry – be that those working in it, those providing data on it, and those eyeing it for expansion – and the word you'll hear most is 'nascent'. But while India's game sector certainly is at its early stages, it's also the one most ripe for growth and opportunity.

Witness the activity of three games industry firms with the biggest development resources – EA, Ubisoft and Sony – which have all looked to harness the territory's talent base this year through a variety of means.

In April, Ubisoft agreed to buy Gameloft's studio in Pune, West India. Like many of Ubisoft's studios in emergent markets, the team there will initially be a co-developer and support studio, porting titles to handheld consoles and helping the French firm's other testing teams. But in time, Ubisoft hopes the team will have over 200 staff within 12 months – a number it says will reach 500 within the following few years.

Electronic Arts has similar objectives. Last month it officially opened its Hyderbad-based studio in India. The outfit currently houses over 200 staff working on a number of projects for its parent. These include mobile game development, online services for *The Sims*, art development for PC and online titles, plus automation tools and technologies for the wider Electronic Arts operation.

Predictably, EA thinks the presence of big names in the region is good for the local industry, offering job opportunities for the local market. Amol Gurwara, head of operations for the mobile division of EA India studio, described the expansion of EA's development interests into India as "a transformational phase for the Indian game development industry".

But it's hard to be cynical about the claims, as the efforts by these publishing superpowers is a far cry from the perception held amongst many that India is just a location for low-cost outsourcing. While the work done in the region by outsourcing heavyweights like Babel (itself now owned by an Indian firm, Quatrro) isn't becoming old-fashioned or out date, it's clear that there are shifts culturally and economically amongst both the industry and consumers that is improving the Indian games industry.

SCEE has played a large part in sparking that change at an industry level. It recently held an Indian developers conference to introduce local studios to its gaming platforms and, more formally, signed a number of studios to develop titles for the local market. This comes at a time when the industry in India is developing beyond the outsourcing model and increasingly-affluent consumers are turning to games consoles for entertainment (*see Factfile, left*).

"The business response to the increased activity for PlayStation has been encouraging. The last fiscal has seen almost a six times jump in console numbers and a ten times growth in the PlayStation games sales in India. The growth perspective continues in the current fiscal with a very positive outlook for the segment," explains Atindriya Bose, country manager for India at SCEE. Bose points out that the establishment of a distribution pipeline through the Sony DADC Indian replication centre and a stringent attitude to piracy at government level has also been key to laying the foundations for a ripe local games market to sit alongside its burgeoning games industry.

But the development sector is most "critical," says Bose.

"There are already established players in the animation area. The country's capability in the IT space today is unquestioned. There are gaming companies being set up to be able to combine these strengths and move into the space of game development. SCEE has already organised a two-day developers' conference in India under the aegis of Devstation Mumbai08. This created considerable interest in the Indian game development fraternity. This also saw the flagging off of the first Indian game with complete Indian content. SCEE has combined with Aurona Technologies, India to roll out a game on the character of Hanuman from

> ***"India will soon emerge as a key development hub for many international games companies…"***

TUNITY

Indian mythology. The competence and the state of readiness of the Indian developers makes it imperative that India soon will emerge as a key development hub for many international games companies."

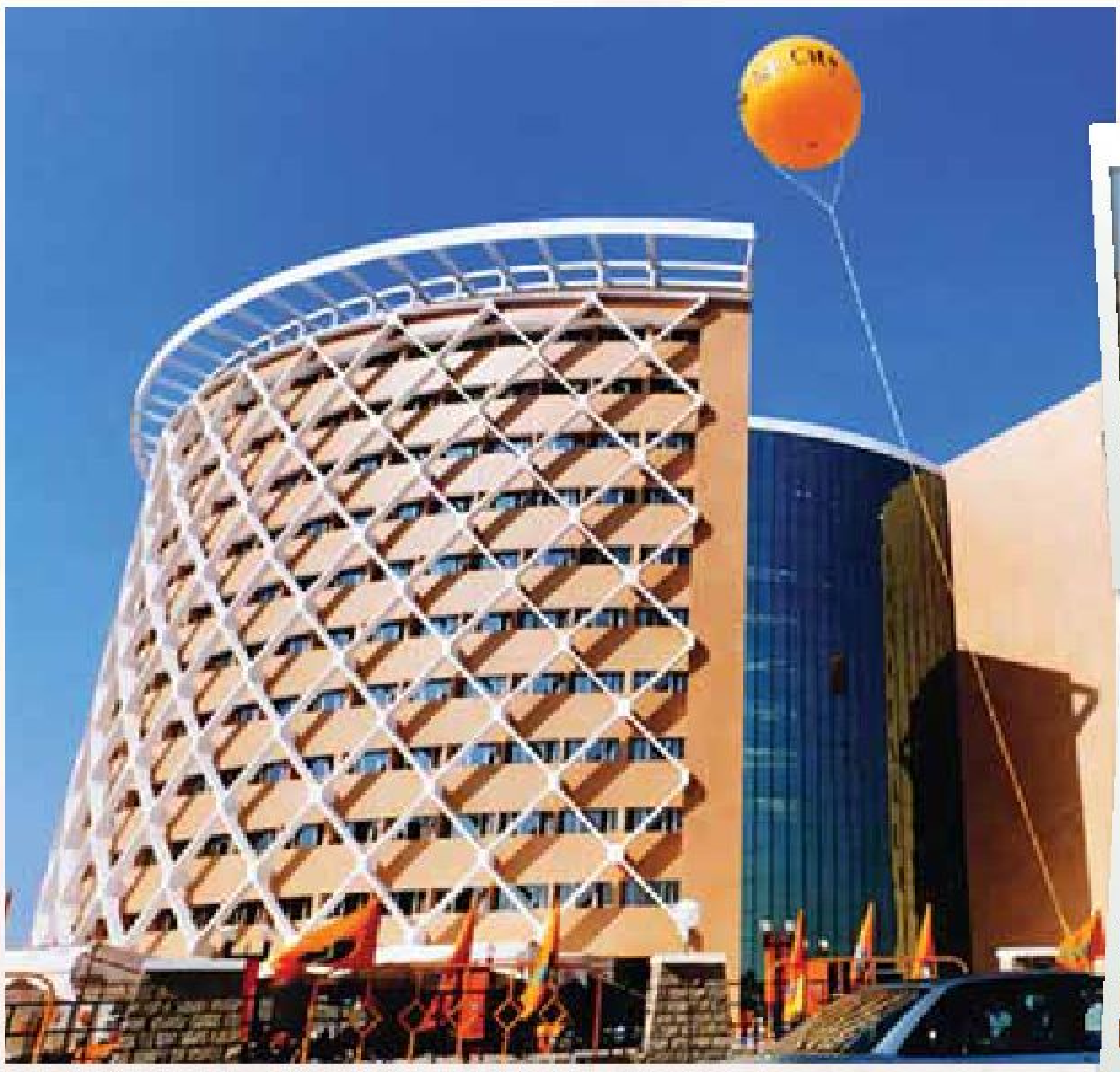
Sony's activity has been welcomed by local studios, and not just those it has signed up for development deals.

"Other console manufacturers should take a leaf from their book. SCEE's activity is very encouraging for Indian game developers and will definitely boost the gaming sector," says Mohit Sureka of Mumbai-based Spiel Studios, one of those very firms offering both games development and outsourcing services. Formed over two years ago, the company began by developing titles based on Indian movies and celebrities for the local market, but has since carved a place for itself on the global stage. It's one of the only Indian firms to become an authorised Apple developer for the iPhone, and is also one of the firms SCEE authorised to develop games for the PS2 and PSP.

Already, says Sureka, games companies in the region are looking to compete with rivals in other emerging Asian markets: "When we started out, there were only a handful of developers developing mobile and online games for the local market. To date, the gaming industry in India is in a very nascent stage and has the potential to grow by leaps and bounds. Recently, international developers have started recognising India as a potential hub for developing gaming products. India has a pool of one of the best animators and artists available in the world.

"90 per cent of animation and game art outsourcing happens from studios in India. Apart from matching international quality, India offers a significant cost advantage compared to other outsourcing destinations like Taiwan and South Korea."

Middleware firms are also seeing the rapid development of the games industry in India first hand as companies in the region look for tools to aid their move from outsourcers to full-flavour studios. One of those is Servan Keondjian, founder of Qube Software, who recently spoke at DevStation Mumbai. "There was clearly a lot of excitement amongst Indian developers, not least because Sony have very astutely identified the PS2 as the console that's going to crack India for them," he explains, pointing out the machine "delivers performance at a price that is increasingly within the reach of middle class Indians".



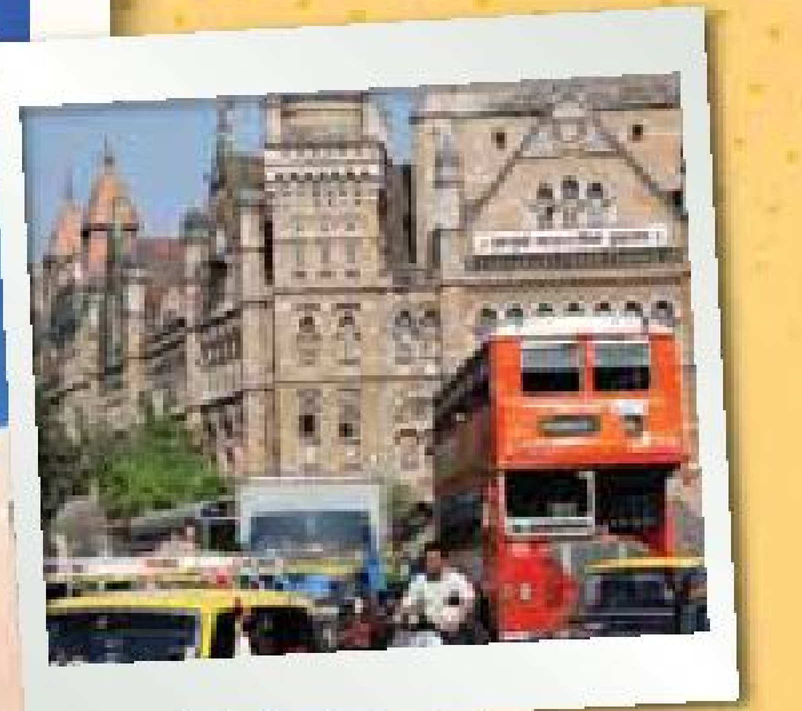
He adds: "There's also a huge catalogue of existing titles for the PS2, while studios with an eye on the Indian market are busy developing titles created specifically for gamers in the sub-continent."

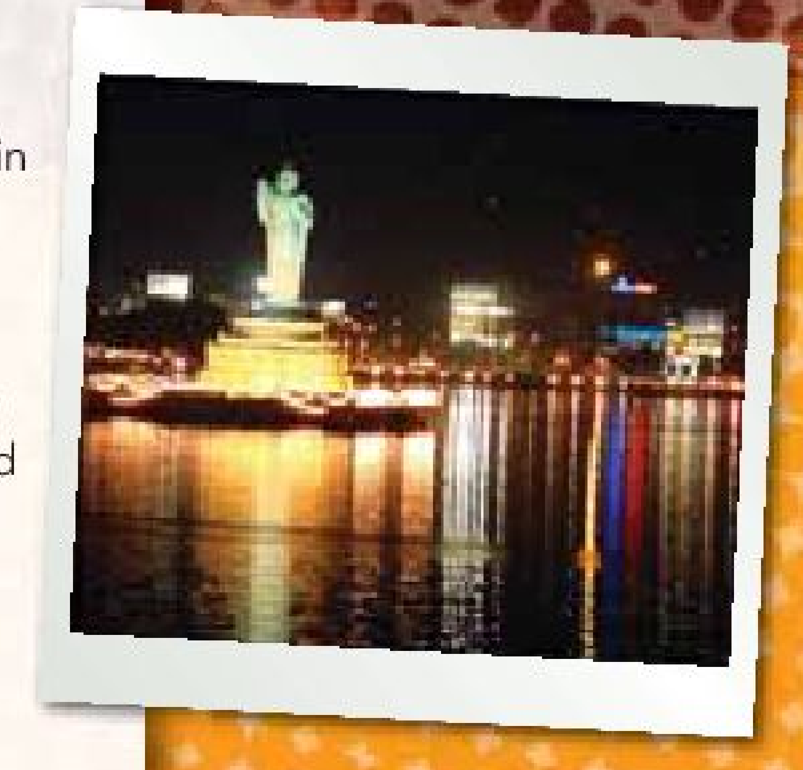
Keondjian's also done his research on the market opportunities, pointing to a report from Diana Farrell and Eric Beinhocker of analyst firm McKinsey on the economic changes that are giving rise to a wealthy middle-class. "While India's middle classes make up quite a small proportion of the population at the moment, they still number 50 million, which is an exciting market, and by 2025 analysts like McKinsey have estimated that India's middle class will have grown exponentially to almost 600 million people."

Some of Qube's initial signings for its Q middleware have been those in Asia. "From Qube's point of view the fact that we offer a fully featured game engine that runs on the PS2 in its latest iteration means that we are generating a lot of interest in India. Studios are really attracted by the idea that they can use Q for the PS2 games they're developing for India now knowing that when they move to the latest generation of consoles they have a true cross-studio solution that means they'll simply be able to move all their people, their tools and their assets across seamlessly."

Plus, the growth of the local market, on both consumer and industrial levels, will help feed a competitive spirit amongst studios in India and help raise quality of their output, Sureka says. "This will also overall increase the gaming community as there would be more Indian gaming content on offer. And it gives a chance for Indian developers to show their skills and expertise and develop games independently."

www.scedev.net
www.spiel-s.com
www.qubesoft.com





A NEW GAMES F

Michael French puts the spotlight on Lucasfilm's aspirations for its Singaporean games team…

FACTFILE

SINGAPORE

Singapore's games industry is relatively small compared to other Asian markets – no surprise given that it is one of the only three city states in the world with a population under 5m.

However it has a relatively large community of developers (relative, that is, to that tiny populace), with local agency Singapore Media Fusion naming over 40 games companies as present in the country. The amount is evenly split between local offices for global publishers, studios in the country, and animation firms.

That said, games are a relatively new thing for Singapore. Authorities in the region have, since just the start of this decade, tried to hatch games industry there through a mix of schemes and small incentives. The thinking is that games are ripe to be made there as the workforce is technically minded. And there are links to universities and good employee laws.

But the recent UKTI Playing for Keeps report, penned by Games Investor Consulting, concluded that Singapore has already been and will continue to be marginalised by the surrounding games-savvy countries. It's already seen as the most expensive place to develop games in Asia, thanks to high salaries and living costs, and when compared to China, India, Japan and South Korea hasn't yet produced a games industry with pedigree. It's also predominantly a location for mobile phone and low-end MMO or casual game development – typically the areas hotly discussed as ripe for opportunity, but not what establishes global status.

That of course could change in time – LucasArts' activity in the region is without precedent, major players like EA and Koei have busy teams there, and Ubisoft's opening of a Singapore studio earlier this year is effectively a major endorsement of the country. But that doesn't change the fact it is early days for Singapore as an industrial games power, meaning the jury is still out on this emergent market.

www.singaporemediafusion.com

While there is still some doubt over Singapore's games power (*see Factfile, left*), the studio opened there by Lucasfilm, which also houses LucasArts Singapore, is one of the more intriguing development teams based in the country.

The studio is unique in a number of ways. Its games team is effectively a studio housed within a wider animation company – itself part owned by the Singapore authorities – and is charged developing titles based on the new *Star Wars: Clone Wars* CG cartoon (animated by Lucasfilm Singapore). With the pilot for the TV series recently released as a fully-fledged feature, hopes are now similarly high for the studio's first games, Wii and DS titles that could finally prove Singapore can handle full console game development and big IPs.

The two halves of the Lucasfilm Singapore brain – games and animation – have also been collaborating closely, sharing art assets in a bid to finally prove LucasArts' theory that special effects and interactive entertainment can develop together and collaborate on technology. We spoke to studio head Feargus Carroll to find out more…

Although Lucasfilm owns the majority of the studio, a stake is also owned by local development agencies – what advantage has that provided?

EDB Investments, the investment arm of the Singapore Economic Development Board, is one of the members that invested into Lucasfilm Animation Singapore (LAS). LAS has benefited from the Singapore government's efforts to develop local talent and attract top talent from the world.

This is illustrated by the launch of the Jedi Masters Program (JuMP), which we embarked on with EDB. JuMP is an apprenticeship program that provides a platform for bright young talent in Singapore to be trained by industry professionals from ILM, Lucasfilm Animation and LucasArts. Upon the completion of JuMP, the apprentices will either be taken on full time by LAS or placed in related positions in the local industry.

What's the make up of the studio in terms of those who are local to Singapore versus those who have travelled over?

In the Games team we're about 50/50 between imported and local talent. Most artists are from the region, while there are more overseas engineers and game designers.

Has it been a challenge attracting staff to come and work at the studio?

There is always a challenge but we're lucky in that we have fantastic properties like *Star Wars* and the amazing location of Singapore to offer our talent.

Do you hope the success of the *Clone Wars* game will help put Singapore on the map?

I believe Singapore is already on the map – EA has been here for a number of years, and is expanding. Ubisoft just moved in and are expanding. We've been here since 2005 and already there is an awareness that games get made in Singapore. However, I'm sure the *Clone Wars* movie, TV series and game will all add to that growing awareness.

How do you see the region evolving in terms of games development talent in the years to come?

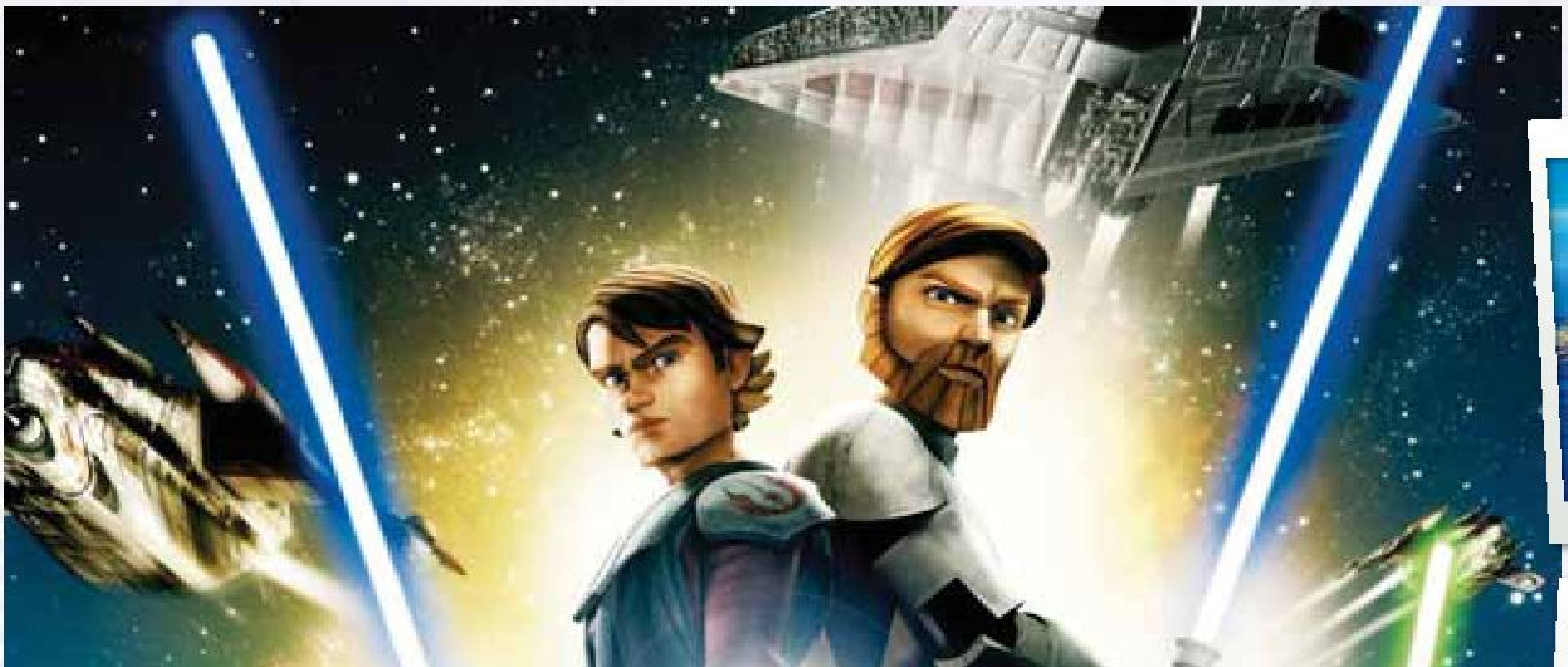
Imagine Vancouver or Montreal ten to fifteen years ago. A few big studios move in, import experienced talent, train local junior talent, and make some great games. Over time the teams gain more knowledge of how the industry works, and how games get made. Eventually there are studios with regional talents producing products for the global market, and so the industry grows. I see no reason why Singapore would not continue to evolve in this way.

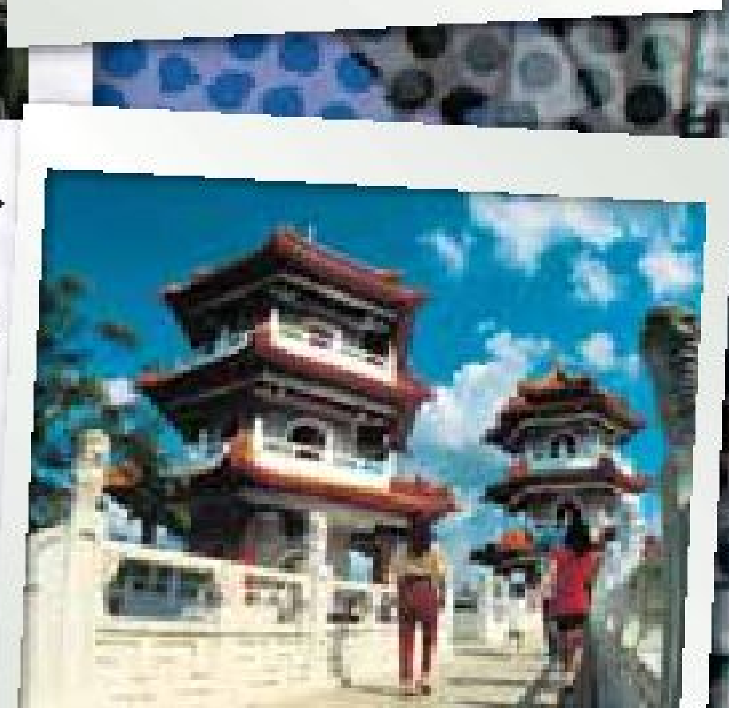
> ***"Singapore is similar to Vancouver or Montreal ten to fifteen years ago…"***

How big does the studio plan to grow to in the years to come?

We've just been through a rapid growth phase across all the divisions – Animation, ILM and

ORCE?





Games. We're now looking forward at new games and new projects to help identify how we'll continue to grow.

Has sharing facilities with Lucasfilm Animation allowed for any synergies in CG asset production? If so, can you detail how and what the benefit of this has been?

One of the key reasons the games team is here is to leverage off the fact that there is a TV production facility creating assets that we can use. We are already conducting successful tests on taking TV characters and rationalizing them for Gen 3 game engines, and it's proving very promising. Of course for the Nintendo DS we had to build the models from the ground up but we still worked closely with the TV artists to ensure we matched the animation style, the lighting style and the painterly texture look of the show. Moving forward there is the plan for TV to use some of the assets and locations that we created for our game and work them into the TV series. This reuse and sharing of assets, be that design, concept art, or actual models, will only increase as the game team moves to more powerful hardware.

> *"One of the key reasons the games team is here is to leverage the TV production facility..."*

RISING FUN

Ed Fear offers up a snapshot of one of the games industry's founding nations…

FACTFILE

JAPAN

Of all of the Asian countries and their game markets, Japan's is perhaps the most widely known thanks to its influence in growing and mass-marketing the console eras almost single-handedly. Today, the situation is less rosy – many have spoken candidly about how the West has, in some terms, overtaken game development in Japan – but tides look to be changing.

According to Enterbrain's Game Maker Yearbook 2007, there are 195 game development studios in the region. 160 of those are centred in or around Tokyo – the Chiyoda, Shibuya and Shinjuku areas of the capital in particular – with the Kansai region of Osaka and Kyoto second most populated, with heavyweights Nintendo and Capcom making up part of its 18-strong force.

Its biggest employers are Sega, which housed 3,464 staff at the time of Enterbrain's survey and Square Enix with 3,275, boosted by its acquisition of Taito in 2005. Its smallest is *Super Smash Brothers Brawl* creator Sora which, given that it only exists for designer Masahiro Sakurai to be able to work freelance, has only two registered employees – although Nintendo president Satoru Iwata has admitted that over 700 staff were 'borrowed' from 19 other nearby development studios. Indeed, it's with collaboration that Japan has always lead, taking up the outsourcing model years before it became popular in the West. The country has also had a long history on promoting key staff behind the games, and heavily promoting new games based on the talent 'tag team' behind them.

Game education in Japan is quite advanced, with over 45 institutions offering courses on game development, many of them either entirely focused on games or specialising in other pop media such as comics and animation. These courses are marketed openly in consumer magazines such as the market leading weekly *Famitsu*, as are job opportunities in studios, helping to get across the message that games careers are viable to both a wide – and young – audience.

Although there is a definite difference between the corporate cultures in the likes of Japan when compared with working life in North American or European studios, what might surprise you is that the struggles faced by studios in those usually contrasting areas are very much uniform. Then again, given that Japan birthed a huge part of the global games industry's legacy, perhaps the shared problems aren't so surprising.

Ahead of the recent 'Japanese GDC' CEDEC (full report on that next month) we spoke to Square Enix's chief technologist Naoto Yoshioka to find out more…

How has the Japanese game development landscape changed in the past ten years?
I think that games have gotten to a scale where they can't be covered by engineers alone, and that the diversification and difficulty of the techniques involved are progressing to a point where they can't be covered by 'creators' alone.

> *"The number of people skilled in planning and design-related areas is not sufficient…"*

In England, a lot of game developers are having significant problems in finding enough talented staff. Is Japan facing a similar problem? Are graduates of the so-called 'game schools' graduating with the right skills?
In terms of those skilled in implementation, there are just about enough. The number of people skilled in planning and design-related areas, however, isn't sufficient, and because of the deficiencies in knowledge of those coming from the 'game schools' that probably won't change.

However, if we elect 'change' as a survival strategy, I think that a great effort will be required in the future to call back to the industry those people who received what wasn't regarded as 'game-specific' training.

What do you think makes Japan a good place to develop games in comparison to the rest of Asia?
I've personally not studied the Asian climate outside of Japan, so I don't really know, but I am surprised at the prosperity of game studios based in Shanghai.

Recently, many Western developers have put in measures to reduce crunch and the associated stress as much as possible. How is the 'work-life' balance for Japanese development staff?
I'm not sure that 'stress' and 'frustration' are part of it. In the end, stress is something that you can escape from at your discretion, but I don't think there's any way to get away from frustration. It's thought that the only way to resolve this is to attack it, but when the development schedule looks bad it can appear to significantly lengthen this.

In other words, if you try to address it in an attempt to eliminate frustration, it becomes something that stays around. This could be the cause of long working hours.

If you try to optimise the development process to get rid of this frustration, stress will come about because of the change.

Because CEDEC is a skills conference, I want there to be more discussions about how people have solved this in practice.

This is the tenth time that CEDEC has been held – what's changed this year?
In order to increase the quality of the sessions provided, we've enlisted the help of experts of each of the different fields to strictly judge the quality of submissions. This year in particular we've put a lot of focus on the foreign track, which has the backing of top international developers, and on fully embracing roundtables. Also, we're putting value on not just the game products themselves but the technical side too, and there's the establishment of the CEDEC Awards too.

The role taken on by this year's CEDEC is to increase the 'skills' of all of the developers that participate. We believe that the combination of 'skills' and 'imagination' brings forth creative power.
http://cedec.cesa.or.jp/

SEOUL CALIBUR

Develop takes a look at the country described as 'the modern gaming capital of Asia'…

Korea (specifically, the southern region of Korea officially called the Republic of Korea) is infamous as the modern capital of gaming in Asia. Much of the country's games activity, at both a consumer and industry level, has been on the PC thanks to the large-scale penetration of high-speed broadband while gamer tastes seem to favour a mix of both Western classics like *StarCraft* and *WarCraft* and locally-produced MMOs that thrive off item sales and microtransactions.

But that summary does a disservice to one of the world's most vibrant, vast and vital games cultures. The scale of the Korean market is purportedly hard to quantify according to some researchers – thanks not to lack of data, but the fluidity and variety of use computers have in the country. However with 12m households connected to broadband and PC penetration at over 80 per cent plus games available at over 20,000 internet cafes (according to Pearl Research), the factors contributing to the PC games market's success are clear. And on an anecdotal level, Korea is one of the few regions to make competitive PC gaming not just a success but also effectively a closely watched and highly contested 'e-sport'.

> **"Some Korean firms boast, outside of the Japanese games giants, the biggest East-meets-West success stories…"**

Perhaps that latter point is down to Korea's real strength as a games power – that is, it's smart commercial models rather than intellectual property innovation. Although local properties like *Lineage* (NCsoft), *Audition* (T3 Entertainment) and *Kart Rider* (Nexon) are popular brands those same developers have admitted that it's their taking established games concept as a jump off point (compare *Mario Kart* with *Kart Rider*, *Audition* to dancing titles, etc.) into new business where their talents lie.

"A lack of games design skills is perceived to exist amongst even the best Korean developer/publishers, leading to a deficit in globally-successful IP and a need to look overseas for partnerships," said the UKTI's recent Playing for Keeps report.

Like India and Singapore, Korea has recently found itself the target for established Western countries looking to expand their development resource and product portfolio.

Nintendo last year established a local office in the territory to manage the success of its handhelds in the country – a unique development given that limited retail option and piracy has curtailed the mainstream sales of most other consoles.

Elsewhere, EA most recently bought local mobile games firm Hands-On – and earlier in the year was rumoured to be planning the opening of its own PC studio in the country, after successfully working with local games company Neowiz (which it already owns a stake in) to make a localised *FIFA Online* title.

And Microsoft is eyeing the technical talent base, too: the firm plans to invest $147m on growing its business in South Korea. In announcing the investment during a meeting between Bill Gates and President Lee Myung-Bak, Gates singled out games as key, saying a local studio would be able to make Xbox 360 content for consumers in the territory.

Korea's games companies also have comparative aspirations for the global stage. And some of them have made the biggest East-meets-West successes (outside of Japan's games giants) as they look to establish a presence in other countries to offset market saturation in both the domestic market and nearby Asian countries where there games are popular. Nexon, the first games company established in the country, has been slowly cracking the North American market and has local offices and a games development team in Canada. And of course NCsoft, founded in Seoul in 1997, is a global force in online games.

Korea's government has also been investing heavily in technology industries with a number of schemes in place set up to ensure that investment in the region is high. Although the games industry there is not directly targeted by tax breaks, according to Playing for Keeps, half the developers and publishers in the region have benefited from the various funds and grants available to local businesses.

FACTFILE

KOREA

South Korea is home to over 200 games developers – the majority of which self-publish their games online for PC – a not unimpressive level of scale for a country with a population just shy of 50m. The main clusters for development are capital city Seoul and southern port city Busan.

The major players in the area are all developer/publishers which follow the now-established self-publishing and service route. The businesses predominantly boast a large number of employees working in development and support

Key companies include Nexon, NCsoft and NHN. All have massive turnover – NHN in fact has the largest market capitalisation (over $5bn) of any company on the Korean version of NASDAQ, KOSDAQ. Revenues for software sales – across internet cafes and the like, plus retail – are now estimated at over $3bn annually, with the export value of domestically produced games recorded at $565m in 2005 according to the Korean Games Development and Promotion Institute.

Introducing new business models and innovating with technology is Korea's biggest strength, rather than boasting a powerful ability to generate new brands and franchises, talents which countries in the West promote. This certainly has a lot to do with how the country has a strong internet infrastructure and some of the highest broadband speeds and market penetration in the world. Which itself explains why almost all consumer gaming activity centred on PCs, with a scant console games market. Although that is changing through official releases of the PS3, 360, Wii and DS and local offices for the format holders, it's still thought that console makes up under ten per cent of Korea's games market.

Overall, Korea is already seen as well-developed – especially by those local companies now looking overseas for growth – thanks to the wide-spread acceptance of computer games in the country and mass market and cultural penetration of things like internet and gaming cafes.

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Scaleform® GFx

BUILD

THE LATEST TOOLS NEWS, TECH UPDATES & TUTORIALS

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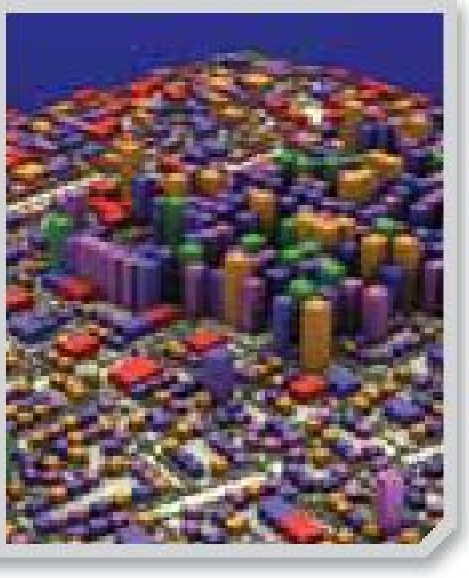

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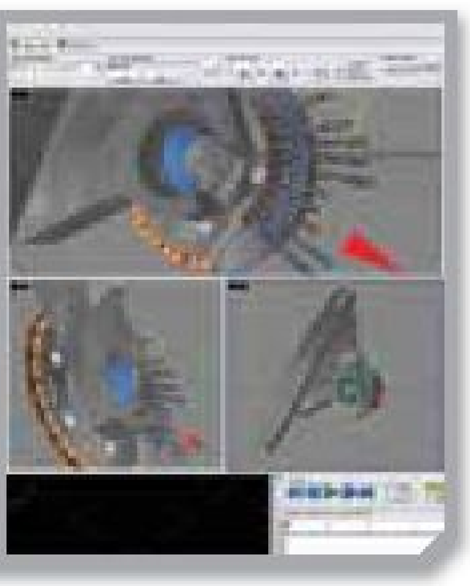

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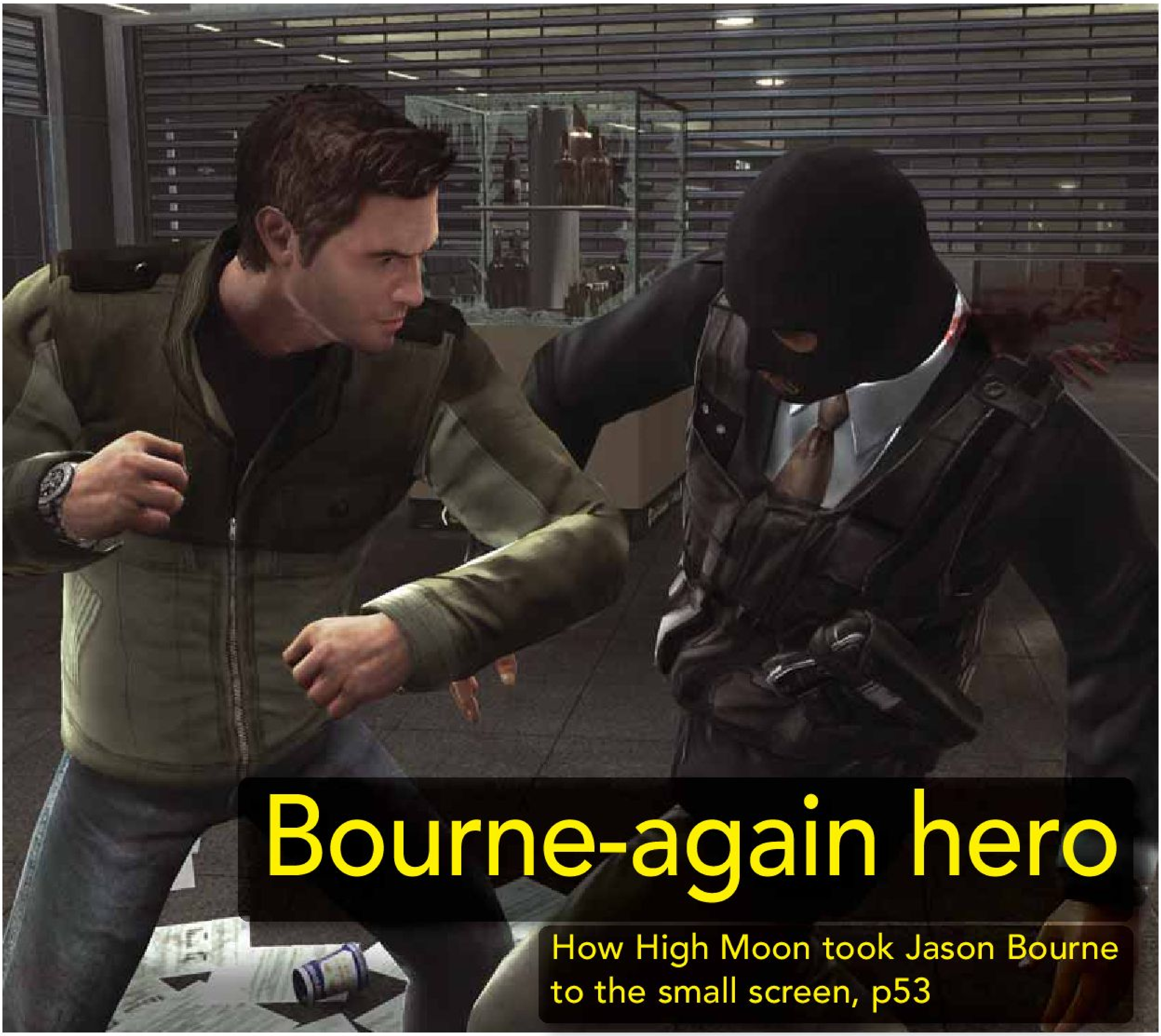


Bourne-again hero

How High Moon took Jason Bourne to the small screen, p53

TUTORIAL: POST-PROCESSING PITFALLS > P57

What goes down, keeps going down

IF THERE'S one predictable thing about technology – successful technology at least – it's that it gets cheaper over time. It's especially the case with invisibles such as software, which is something the forward-thinking games middleware CFO always needs to bear in mind. But what's also significant about this trickle-down effect is that as the marginal price of once expensive features drops, so the quality of entry level products rises.

Stepping outside of games, it's a trend easily seen in consumer electronics. Pricing remains at fixed human-sensitive levels such as £100, £200 and £500 but the amount of stuff included in digital cameras, widescreen TVs and PC grows ever longer. It's now almost impossible to spend over £1,000 on a digital camera body unless you need something that's bulletproof, while the first sub-£600 Blu-ray laptops have just been announced. Typically, they're being sold in Tesco. Of course, at the highest end, there'll always be specialised outputs or features that the professional requires. By dint of market forces, they'll end up paying over-the-odds for those, but the vast majority of people are happier – even if they don't really need an auto-stabilised lens or fingerprint log-in readers.

But back to the matter in hand. The big shift that's occurred recently in terms of game development tools is the rise of those products that once were limited to web, advertorial or student game-making. The prime example in this issue of *Develop* is the Unity3D engine, which is now being used to create MMOs, as well as Wii standalone games. Now, it may lack some of the bells-and-whistles of Gamebryo and Unreal (although Unreal doesn't support Wii so go figure), but at $2,000 per seat, few developers will be complaining.

Jon Jordan
jon.jordan@intentmedia.co.uk

< ART >

AUTOMATIC URBAN PLANNERS

A year on from our first encounter, procedural city middleware company Gamr7 is almost ready for action…

"WHEN WE STARTED OUT, I would look at my office wall, which was full of game screenshots of cities, and ask whether our technology could do that," muses Lionel Barret, technical director of French procedural city building specialist Gamr7, amid the noise of the first public day of the Leipzig Games Convention.

"The answer back then was 'No. No. No'. It scared me. But we have moved forward. Sometimes I think it can't be possible we have done so much in one year," he continues. "There are still some issues when it comes to the very complex stuff – in most cases we can do 80 or 90 per cent of those screenshots and save people a lot of time and money too."

Looking at the output of the company's work, almost a year on from *Develop*'s first contact with an early prototype, it's clear the basic idea of a technology that enables you to quickly and flexibility create entire cities is maturing fast.

As an example, business development director Bernard Légaut says that, in a consultancy role, the company recently had to create three cities each of a different style within nine days for a client. "It was proof we could react faster than anyone else, because while we delivered those cities on time, the process involved making around 40 cities that we iterated through as we got more information from the client," he explains.

"Yeah – we have the luxury of throwing away cities," laughs Barret.

The presentation of the technology, if not the initial concept, has changed somewhat since October 2007, though. For example, working closely with a couple of partner studios has resulted in plenty of useful feedback, resulting in Gamr7 splitting its Creative Ürban Suite into three interlinked, but also standalone, parts.

At the highest level, there's the city builder, which is called the Semantic Urban Studio. It enables you to create an entire city using basic building blocks such as roads, the density of various types of buildings and a human activity distribution model, which works out placement and how big the connecting roads should be.

Creative Ürban Suite

Price: Available on request
Company: Gamr7
Contact: +33 4 77 23 78 32
www.gamr7.com

The Procedural Area Designer operates at a lower level, enabling you to define the different objects and buildings found in a parcel of land, whether residential, commercial or road/pavement.

The final, and as yet incomplete, part of the suite will be a procedural designer for individual buildings. Each element can be used separately – a bit like a Russian doll, says Barret – with the overall plan being to get customers comfortably using one and then encourage them to step up to the advantages of the entire pipeline.

"I think different parts will appeal for different game genres too," explains Barret. "The procedural building designer is interesting for people doing first person shooters for example. Most of them don't require a complete city at the moment, but in time it could be advantage for them."

Another obvious target audience for the Creative Ürban Suite are MMOs. Their huge demands in terms of the provision of basic game environments and content is one reason. Barret says the technology's workflow is perhaps more vital however. "Prototyping and testing the city live is more important and we provide a smooth curve from prototyping to full production," he says. "For example, we can make a city more complex very easily. If you suddenly want to add lamp posts, we can add 50,000 in the correct position immediately."

There's still some way to go of course. A trial version of the technology is expected to be made available before the end of the 2008, and it will be GDC 2009 before the full commercial release is ready for action and we're able to fully gauge whether the vision of Barret's wall of cityscapes has been fulfilled.

www.gamr7.com

The Creative Ürban Suite enables the quick development of complex game cities of varying styles and character

< CODING >

PERFORCE'S 2008 POLISH

New visual comparison tool and enhanced remote and distributed features head up this new point release…

Perforce 2008.1

Price: From $900 per user
Company: Perforce
Contact: +44 845 345 0116
www.perforce.com

THE CONFIGURATION management system from Perforce gets its first point version of the year with the arrival of Perforce 2008.1.

It's an interesting release, as it mixes up the usual improvements to the underlying infrastructure with features that have the potential to both extend the types of files you can handle with respect to version control, as well as how you interrogate those files. To that extent, then, it's the addition of the visual differencing functionality, which enables you compare two image files, that is Perforce 2008.1's headline feature.

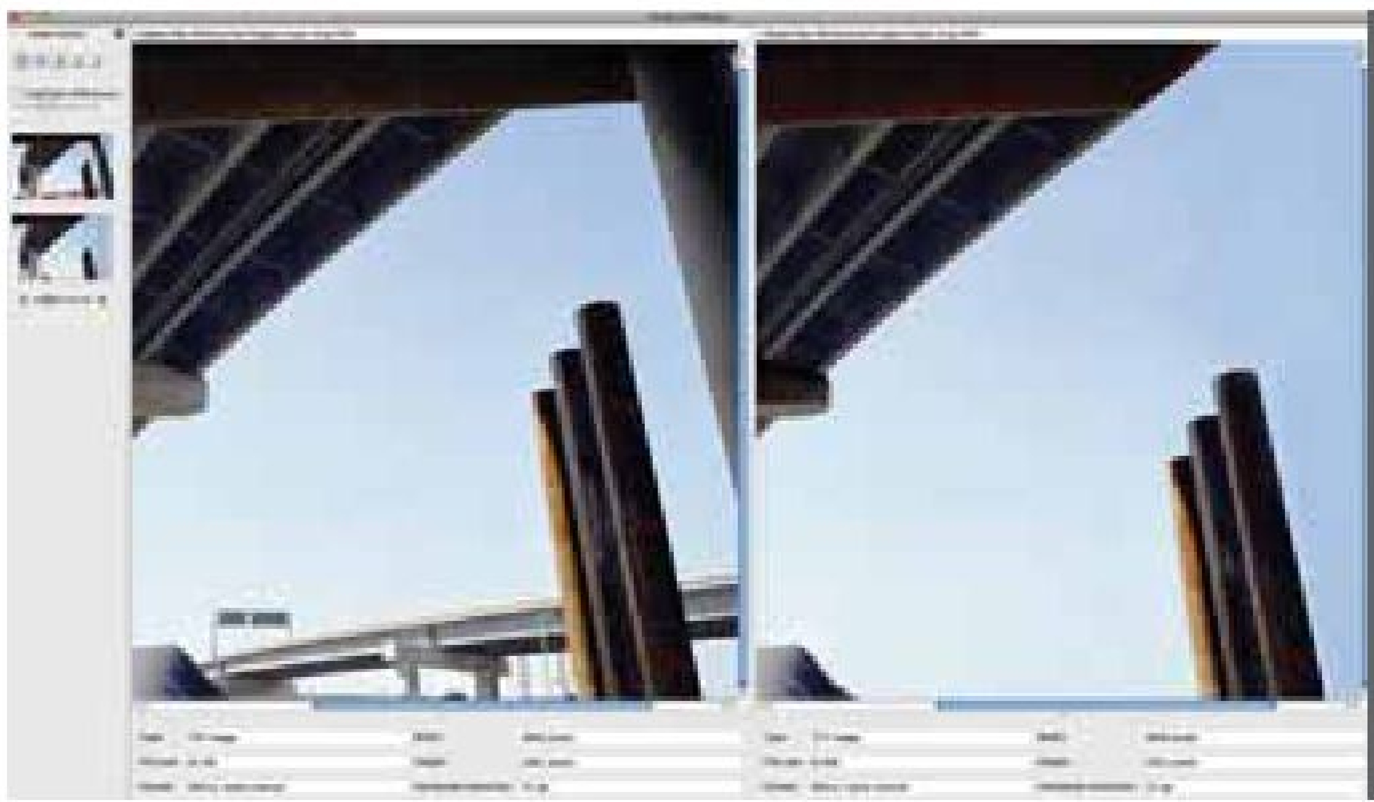
"The differencing functionality is activated when you're comparing two versions of the same file or comparing files on different branches," explains Dave Robertson, Perforce's director of European Operations. "What happens is that, within the Perforce client, it brings up a screen which compares two files and automatically boxes out any areas in the file which are different from the previous version. It also allows you to overlay one image on top of another. We think it will be incredibly useful not only for game developers, but also for web designers, or even if you just want to check your holiday snaps."

The system, which is built on Trolltech's Qt development framework, supports file types such as BMP, TIF, JPG and GIF although not (yet) PSD.

"We're keen to see how people use the diff tool," Robertson says. "Clearly there are additional formats that Qt doesn't support out the box and some of the special tools game developers use potentially would be able to take advantage of that, so we'll see how people experiment with it."

A more routine update is the improved support for Perforce's distributed development features.

"One of the holy grails of distributed development is to minimise the amount of data transfer," Robertson explains.



Perforce 2008.1 brings differencing capabilities to images for the first time

"One of the bottlenecks we found was the way the proxy server would operate if it had to go over the network to retrieve a compressed update. It would then end up doing the decompression, which would hold up any new requests from other clients on the network. Now, however, the administrator has the option to get the client to do the decompression, which improves overall system performance."

As well as this, there have been improvements when it comes to working offline and the process of reconciling changes made when you go back online again.

"In Perforce architecture terms, a local workspace is just a folder that maps to a remote folder where the master versions are stored," Robertson says.

"So when you want to upload your changes, Perforce brings up a screen and tells you what has changed and then creates a package on the fly for submission which brings the two folders into sync."

www.perforce.com

< CODING >

FROM THE BOTTOM UP

With Dare to be Digital usage and various serious game applications, DX Studio looks to be making its mark…

DX Studio v3.0

Price: Pro Edition £375
Company: Worldweaver
Contact: +44 1753 656884
www.dxstudio.com

DEMONSTRATING THE increasing convergence between the concepts and technology of game development and the commercial demands of training, simulation and serious gaming markets comes Worldweaver's DX Studio. A Windows-based IDE, it's designed for producing either standalone experiences, interactive content that can be embedded into Microsoft Office or Visual Studio-based applications or online via the DX Studio Player.

"DX Studio was developed to provide a single IDE for rapid 3D application development," says Worldweaver's Bob Sterling. "Most other tools are limited in terms of providing specific styles of game or simulation rather than providing a general purpose toolkit, and so their results are often disappointing. We wanted to make a professional grade 3D tool at a price point similar to that of Flash and other similar 2D tools."

The package is available in various different forms. The Freeware edition is obviously the most limited, lacking features such as networking, the ability to export models, pixel and vertex shader effects, plus restrictions on the number of physics objects and meshes. The Standard Edition (£175) offers everything apart from networking, the integrated database client and the ability to re-brand the player, while the DX Studio Pro Edition at £375 offers a full commercial license, including re-publishing without further royalties. Site-based licensing is also available, with DX Studio being used in over 20 game education courses worldwide and even by one team from the 2008 Dare to be Digital competition.

The current version is 2.3, but major update version 3.0 is in beta and being prepared for imminent release. It includes new features such as live 3D and 2D editors, including real-time materials and lighting, a terrain editor, which includes procedural options, a Firefox plug-in and a 3D gizmo for manipulating content.

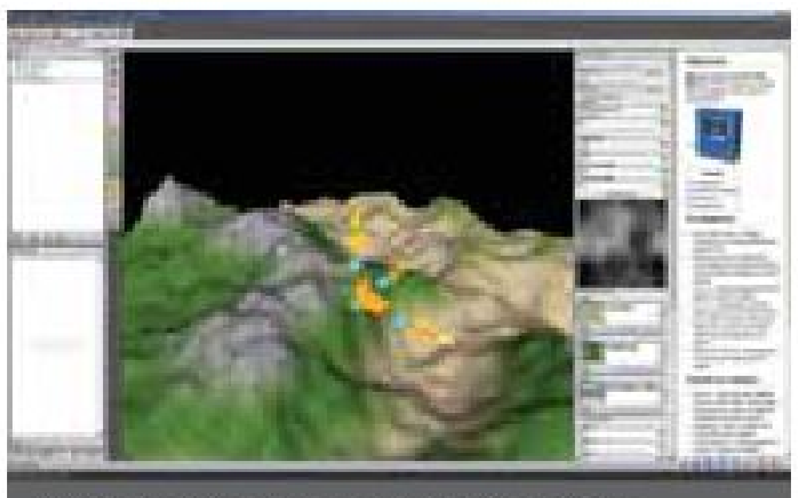
"We feel we offer the right balance in terms of high level and low level code," Sterling explains.

DX Studio also supports the PhysX and Bullet physics libraries, along with the Thedora OGG video codec, and full SOAP and OLEDB clients. There's an SDK too, but game logic can be written using JavaScript.

"This mean an amateur can get hands on quickly, while an advanced user can really fly. The modular design makes large projects easier to handle," he continues.

"Applications made in DX Studio are also backwards and forwards compatible, so you continually benefit from upgrades. Not only that, but nothing is ever locked in, so all resources can be streamed in on the fly from disc or URL without interrupting playback."

Of course, version 3.0 won't be the end of the DX Studio story either. Future features on the to-do list include Mac and Linux players and live video and audio compression, which will be transmissible via the existing networking options. "We're also looking to support some of the more exciting physical devices, such as amBX, multi-point touchscreens and dome projectors," Sterling says. Not bad for under £400.



Version 3.0 comes complete with a terrain editor

www.dxstudio.com

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みんなに教えなきゃ!
Que le graphique est beau!
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CESA Nikkei Business Publications, Inc. docomo CoFesta 2008

UIROUNDUP

Maximised Screen Space

In a few short years, the game UI market has consolidating to offer standardised tools at a reasonable price. **Jon Jordan** asks: Who says capitalism doesn't work?…

Like a bubble, the market for game user interface design middleware expanded quickly with three companies all launching products around 2005. Now, however, the situation is very different; at least in terms of the relative positioning of those companies.

Most surprising perhaps was the decision of the well-funded Anark to sell off its Gameface product in May 2008 to concentrate on the industrial CAD-focused market. The buyer has never been officially announced, but let's just say it's a graphics card company that's been collecting sickly middleware companies like fainted Pokémon over the past couple of years.

The good news for Scaleform, and to a lesser extent small French outfit Omegame, is that the market for specific game-related UI is now ripe for the picking, which indeed Scaleform has been doing with over 300 games claimed to have used or be using its GFx technology.

Of course, the issue with such an overwhelming leadership role is that without exercising your monopoly rights (never popular with the clients), the lack of competition means it's hard to keep revving features and hence maintain pricing – shown in last month's interview with Scaleform CEO Brendan Iribe, who said that the company would be attempting by branching out with new related products.

SCALEFORM

TECHNOLOGY
GFx

CLIENTS
BioWare, Crytek, Firaxis, THQ amongst others

HOST PLATFORMS
PC (Windows, Linux, Mac OS), PS3, PSP, Wii, Xbox 360

INTEGRATION WITH
CryENGINE 2, Gamebryo, GameSpy, Trinigy, Unreal Engine 3

PRICE
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CONTACT
+01 301 4463200

Scaleform's GFx enabled 3D-accelerated UI

www.scaleform.com

Built on top of Adobe's Flash platform, Scaleform's GFx game user interface technology is being used in over 300 games.

It supports 3D hardware acceleration to enable you to make high quality graphics, while the art-focused production pipeline means that after the initial integration process, little programmer overhead is required. GFx also supports many industry-standard engines such as Unreal, Gamebryo and CryENGINE 2.

ADOBE

TECHNOLOGY
Flash 9

CLIENTS
Not applicable

HOST PLATFORMS
Various including Windows, Linux, Mac, mobile

INTEGRATION WITH
Photoshop

PRICE
Adobe Flash Pro CS3: £575

CONTACT
+44 208 606 1100

CS3 Professional is the flagship authoring tool for Flash UI

www.adobe.com

Although not specifically optimised for game UI, Flash remains the industry-standard for the creation of interactive applications ranging from media rich websites to games and graphic interfaces. Its popularity is helped by the fact that it's available on a vast range of devices from desktop browsers to mobile devices including digital cameras.

Authoring environments include packages such as Flex, but the original (and arguably best) is Adobe's own Flash CS3 Professional.

OMEGAME

TECHNOLOGY
Menus Master v2.6

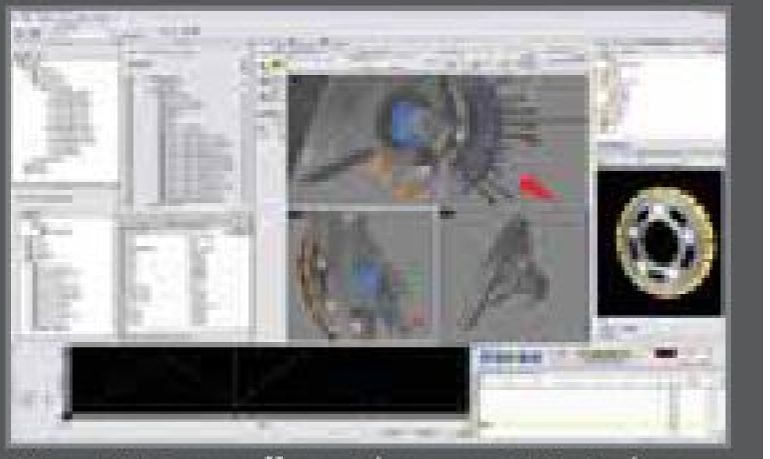
SUPPORTED HARDWARE
THQ, Ubisoft

HOST PLATFORMS
PC, PS3, Wii, Xbox 360

INTEGRATION WITH
None

PRICE
Available on request

CONTACT
sales@omegame.com


Menu Masters offers a three-part UI pipeline

www.omegame.com

Menus Master consists of three interlinked products. Menus Master Studio is an artist-focused package that enables you to create your user interface using 2D bitmaps, vector graphics, 3D objects, video and audio.

It links into Menus Master Data Generator, which is the processing element. This, in turn, feeds into the SDK – or Menus Master Development Kit – which is integrated into your game engine to complete the workflow.

NOKIA

TECHNOLOGY
Carbide.ui
CLIENTS
Not applicable
HOST PLATFORMS
S60, Series 40
INTEGRATION WITH
Various graphics and audio tools
PRICE
Free
CONTACT
Online via Forum Nokia

Carbide.ui is the UI tool for S60 and Series 40 devices

www.forum.nokia.com

Part of the Nokia Windows-based development suite for its S60 and Series 40 devices, Carbide.ui provides a family of graphical, WYSIWYG tools providing for basic user interface customisation. Using it, you can integrate your bitmap and vector graphics plus audio-editing applications to design theme elements.

Support is also provided for platform-specific elements such as call handling and Active Idle screen volume control.

TROLLTECH

TECHNOLOGY
Qt and Qtopia
CLIENTS
Not applicable
HOST PLATFORMS
Windows, Mac, Linux, Embedded Linux, Java
INTEGRATION WITH
Eclipse, Visual Studio
PRICE
Available on request
CONTACT
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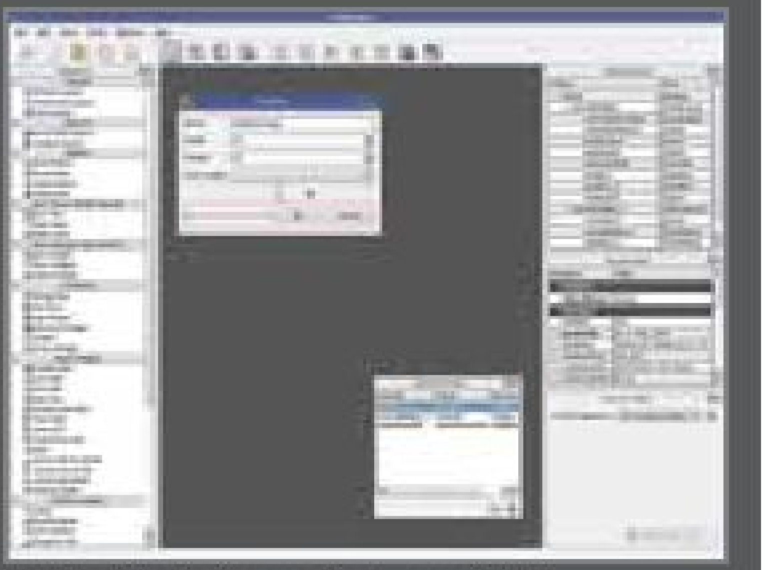


Trolltech's platforms feature solid UI designer tools

www.trolltech.com

Although much more than a UI creation tool, Trolltech's Qt cross-platform application framework and its Qtopia application platform for embedded, portable devices and mobiles both have strong interface design features.

For example, Qt Designer enables you to rapidly and visually design advanced user interfaces such as widgets and dialogs using real-time previewing. Qtopia also supports up to 24 bits per pixel and multiple displays.

Time and Motion

by David Jefferies

Black Rock Studio

FRESH!
SkyScraper

BACK IN THE EARLY 20th Century two married scientists called Frank and Lillian Gilbreth pioneered a technique for analysing hand movements and optimising them down to the minimum necessary to perform a given task. They called this a time and motion study.

One of the Gilbreths' first studies was directed at the productivity of bricklayers. After analysing their movements, the Gilbreths made many recommendations for improvement. These included having the bricks pre-stacked by cheap labourers so that the best side of the brick always faced outwards, meaning the bricklayer didn't have to rotate the brick to find its best side. Another was placing the bricks and mortar in such a way that they could be picked up in one hand and the mortar in the other. In this way they reduced the number of movements required to lay a brick from 18 to 4.5. In later years these same techniques have been used to teach army recruits to rapidly assemble and disassemble their weapons whilst blindfolded or in total darkness.

One of the things I'm interested in is exactly what actions the designers and artists have to perform to get their assets into the game to start iterating. If we can minimise the number of steps then we can improve their productivity and lower their frustration levels which will ultimately lead to better games.

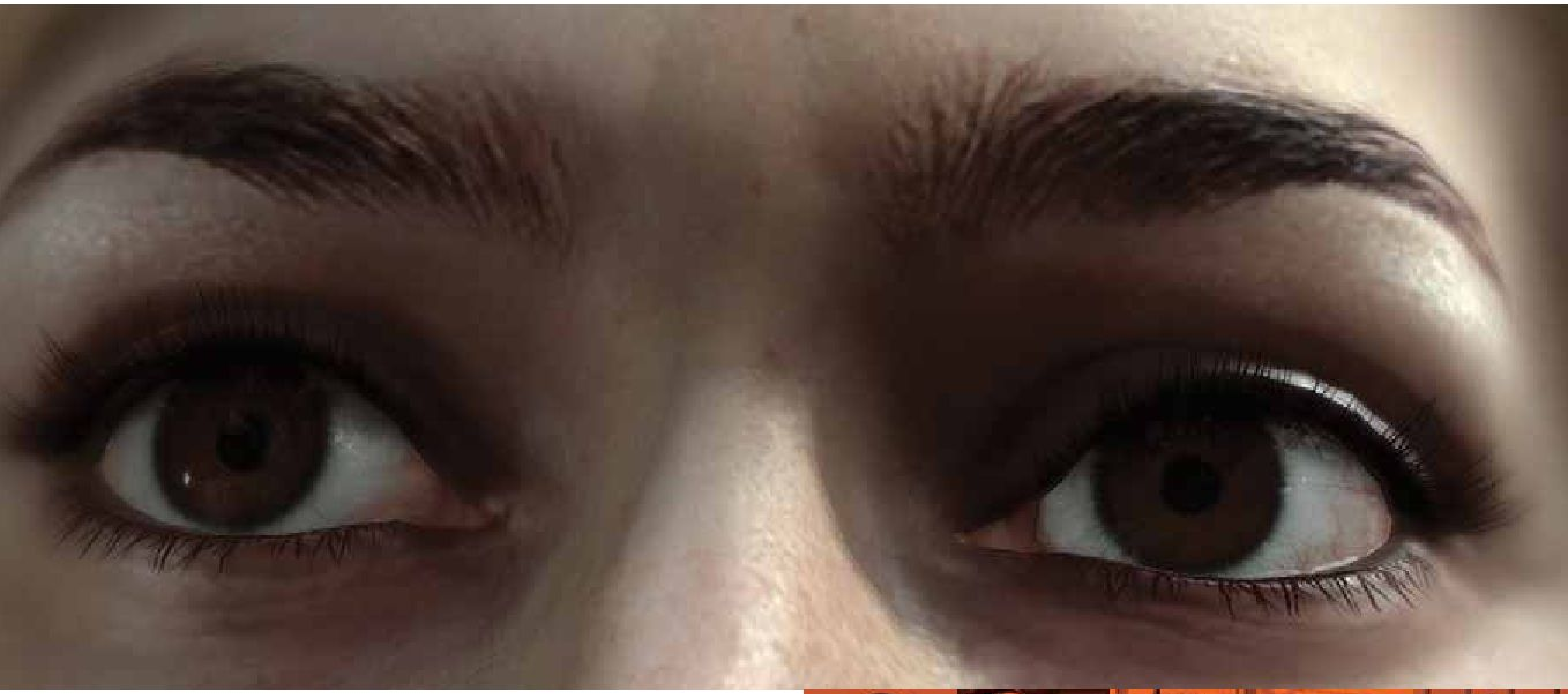
This is particularly pertinent for us at Black Rock Studio because we write most of our tools, including our modelling and texturing tool called Tomcat. Years ago Tomcat went through a time and motion study and now, having just added a major extension to it to support our new game, it's time to do it again.

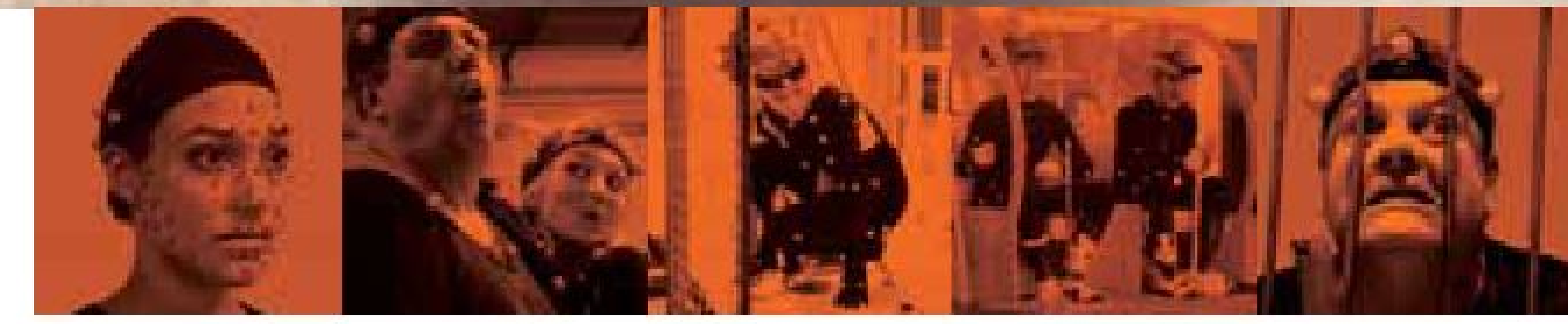
We get the lead programmers in a boardroom equipped with a PC and a target platform, typically an Xbox 360 or PS3, a video camera for recording the test subject and a video capture unit for recording what's on screen. We'll then get an artist or designer, as appropriate, to go through the motions necessary to take an asset all the way from concept into game and iterate on it. During this time the programmers observe but aren't allowed to say anything to avoid them derailing the experiment.

Remember this isn't just an analysis of the UI of a tool, this is every single action required to get the asset into game. The next step is to analyse the results and determine where time is being wasted and come up with a plan to target the problem areas.

In time, using these techniques, we will also be able to train our MIS department to rapidly assemble and disassemble our PCs wearing blindfolds.
www.blackrockstudio.com

quanticdream
VIRTUAL ACTOR STUDIO





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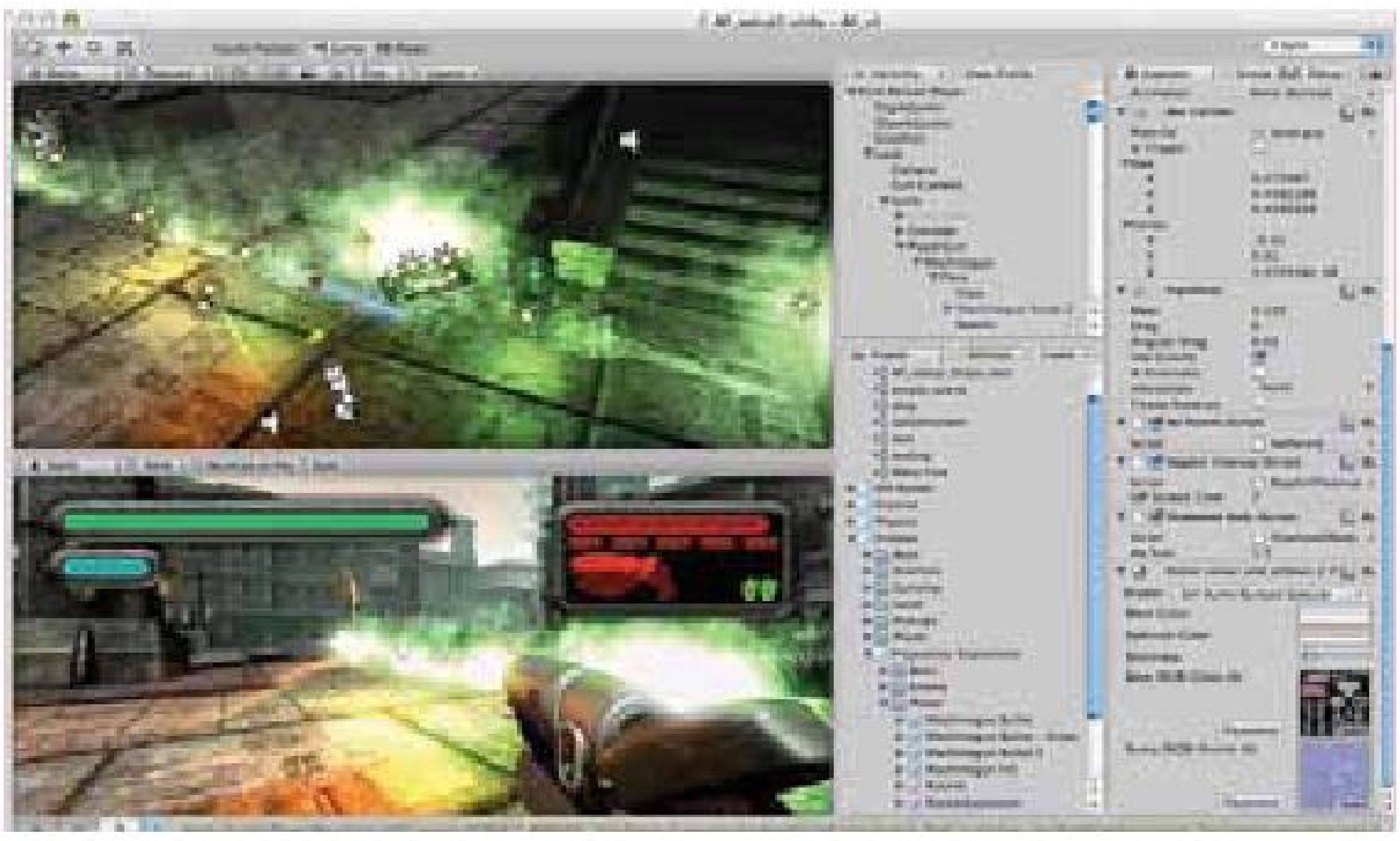
www.quanticdream.com

KEYRELEASE

PRODUCT: Unity v2.1
COMPANY: Unity Technologies
PRICE: From $200 to $1,998 per seat
CONTACT: info@unity3d.com
W: www.unity3d.com

A singular strength

Originally a web game technology, the Unity 3D engine is now branching out to cover PC, MMOs, Wii and iPhone, discovers **Jon Jordan**…



Unity's integrated editor lets you immediately jump into the action to test it out

AS BUSINESS PLANS GO, launching a middleware company that offers a game engine which competes against the ubiquitous online Flash technology – and one that, in terms of its development platform, only supports Apple Macs – would hardly get you the support of those canny entrepreneurs on Dragon's Den. But then again, those canny Dragons made their cash in ceramics, nursing homes and ladies underwear, not technology – which is why they're showing off on TV while David Helgason, CEO of Copenhagen-based Unity Technologies, is hard at work.

And hard work it must be, dealing with a burgeoning success story that's currently being used to create three game portals, five virtual worlds and two as the client technology for MMOs – Cartoon Network's kid-focused *FusionFall* and an as-yet unannounced casual game from *Age of Conan* publisher Funcom.

Of course, that's not to mention the hundreds of Unity licences sold to everyone from bedroom coders to established game studios – an indie license costs $200 per seat and scaling to a maximum of $1,988 if your company made over $100,000 in its last financial year, and that's for the more expensive release with the additional version control server. It's $1,499 without.

> ***"Apple is incredibly open to the community…"***
>
> ***David Helgason, Unity***

And if that activity wasn't enough for the CEO to be worrying about, there's the iPhone version, which is in development, and a major update that will finally add support for those peculiar developers who prefer to make their games using PCs running Windows OS. Not much pressure then?

"We sit in an interesting place in the market," ponders Helgason. "Last year at our Unity conference, on one table there were people from a venture-funded start-up making a virtual world and next to them was a 15-year-old kid with his father. We have a varied community, which works really well because a lot of those 15-year-old kids are really good and end up working with the VC companies or getting their games on the big portals."

In fact, the activity that's occurring behind the scenes at Unity is also being fully mirrored in the community. "Anyone who's good using Unity is busy with all kinds of projects," says Helgason. "It's kind of annoying because we'll get requests for people to help out on various developments and at the moment it's almost impossible to find anyone who has any spare time."

That's one of the reasons for the push to get the Windows version of Unity finished. "It's a very, very high priority," Helgason explains. "There's a lot of work in there, and it's happening alongside all the other development work. Being a Mac-only tool is limiting though. Our most pessimistic view is that we'll triple sales on the day we release the Windows version of Unity."

Even the Dragons should prick up their ears at that.

Still, Unity has come along way since it was initially rolled out as an engine and development environment for making casual and ad-based web games. But even then, it was the depth of features offered through the integrated editor system that impressed. As is now *de rigueur*, Unity offers a live, drag-and-drop development environment that enables you to immediately jump into the action, testing out how things work as well as analysing scripts and tweaking values.

Packaged as a complete engine, it has a plug-in architecture that lets you add custom features – Ageia PhysX has been officially integrated, for example. Other bullet points include three scripting languages (C#, JavaScript and Python variant Boo), a shader system, terrain sculpting tools, support for most art file formats including Collada, and deployment via browser, standalone PC, Mac or Wii – although the latter will incur extra licensing fees of $30,000 per Wii title and $15,000 per WiiWare title.

"I think it's a huge plus for our customers knowing they can start off making a web game but if they get a deal with Nintendo, they can put their game on the Wii or iPhone and, in time, I expect we'll end up supporting the other consoles too," Helgason says.

He's currently most excited by iPhone though. "It seems Apple is incredibly open to the development community so it's a great platform for us. The nice thing is people can start using the current version of Unity and know their game will work on iPhone," he enthuses. "For example, you'll be able to hook your iPhone into your Mac and prototype directly inside Unity using iPhone as an input device."

www.unity3d.com

Top: As well as realistic clouds, Unity's lighting system mixes realtime shadows and baked lightmaps

Middle: Unity's ShaderLab language supports standards such as Cg and GLSL

Bottom: Unity's terrain editor enables you to sculpt using brushes and then paint on the foliage

Greasing the wheels of installation

It's perhaps less of an issue for some users now that Unity is supporting standalone games, but deployment via its web-based browser plug-in does remain an important channel for some – notably its new MMO-based customers. It's for this reason David Helgason points out that while percentage-wise few people will have already installed the Unity plug-in, the company's focus on the making the installation process as smooth as possible has been vital to its later success.

For one thing, the plug-in is only a 3MB download and it doesn't require the user to reload the page, much less restart their browser or enter registration details. So using a rough back-of-a-fag-packet calculation, if you assume Unity has a 50 per cent greater success rate than more cumbersome technologies such as Shockwave at getting people who don't already have the plug-in installed to install it, it can gain rough parity even with those much more widely distributed technologies. For example, Unity's figures suggest a 70 per cent total install rate for games that require installation of the Shockwave plug-in versus 60 per cent for the Unity plug-in. Not bad if you think less than one per cent of people in that model will have the Unity plug-in installed.

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SOLUTIONS

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Nathan Fisher (Lead Artist)

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UNREAL ENGINE 3 AND THE BOURNE CONSPIRACY

The following is an excerpt of a story written by John Gaudiosi for www.unrealtechnology.com.

High Moon Studios recently shipped Robert Ludlum's *The Bourne Conspiracy* for Xbox 360 and PlayStation 3. When asked about its critical development decisions, the studio said the first step it took in bringing a virtual Bourne to gamers was licensing Unreal Engine 3.

"Unreal Engine 3 brought a decade of development in tools which allowed content creators an unprecedented level of control and power," said Clinton Keith, chief technology officer of High Moon Studios. "Not only was the team productive from day one, but we all learned better ways of creating games as well."

Keith added that although this was the studio's first time with Unreal Engine 3, the support services that Epic provided were a great resource during and after the climb up the initial learning curve that the introduction of any new technology brings.

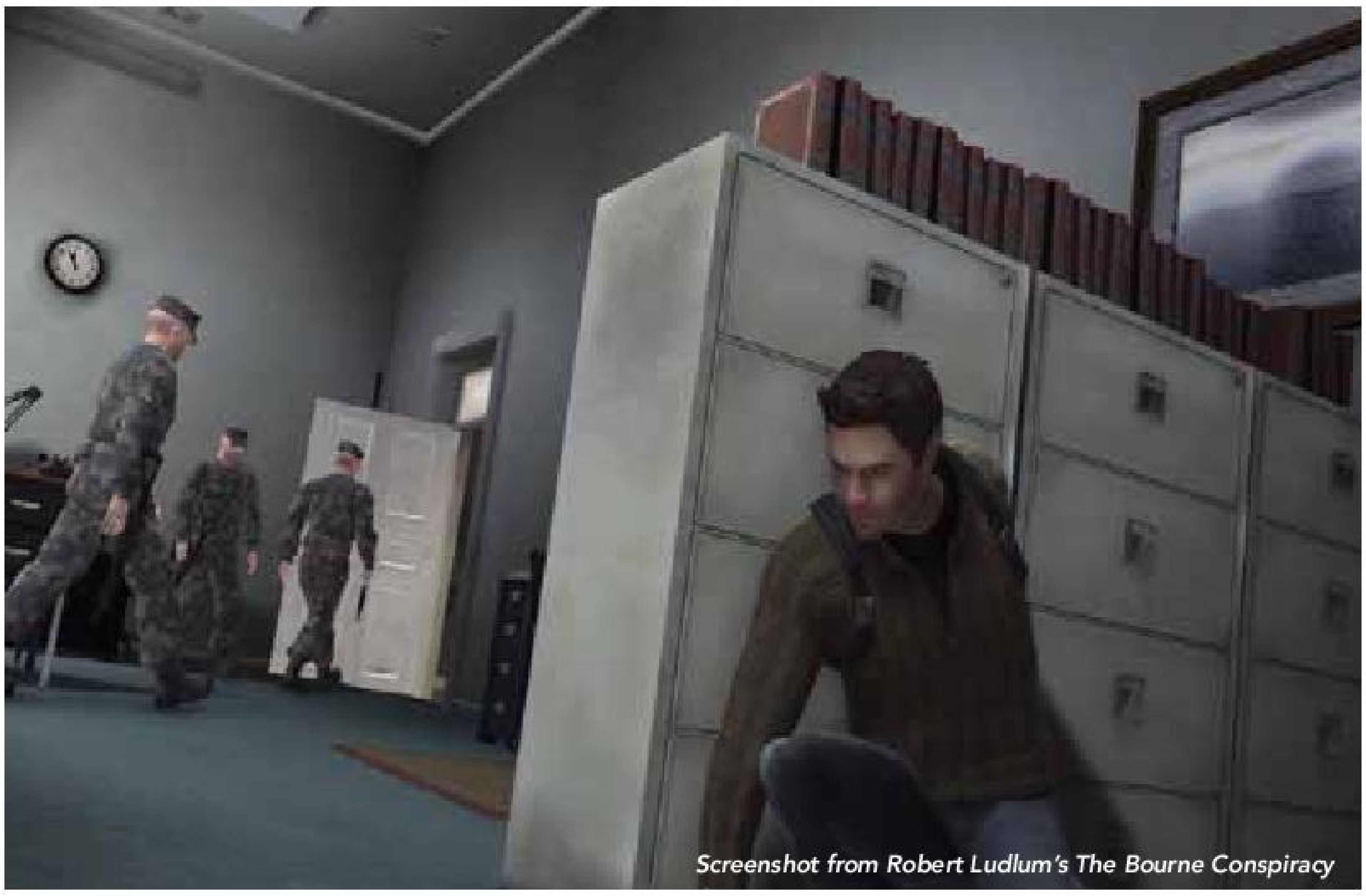
"Apart from the tools, the benefit from having the entire pipeline working on day one was huge," explained Keith. "While you may develop your own engine, there is always an overhead of problems and constraint on how many resources you can dedicate to solving those problems. By using an engine from a company that has a support business model, you get the benefits of having more resources dedicated to solving problems."

High Moon worked with Oscar-nominated screenwriter Tony Gilroy, who wrote the three Bourne films, as well as Jeff Omatta, the fight choreographer, to bring the cinematic style and tone of the Bourne universe to consoles. Sean Levatino, High Moon's senior technical designer, said that using Unreal Engine 3 allowed the team to focus on new gameplay elements right out of the box.

"Epic provided us with a robust suite of tools that allowed our artists to start developing the game from day one," explained Levatino.

"The Kismet system is a programming language, but it's very visual. It allowed designers to create complex setups basically on their own without requiring programmer intervention."

One key gameplay feature in *The Bourne Conspiracy* is the ability of Jason Bourne to turn any object and any environment into a lethal weapon. He doesn't use guns as the hunted Bourne, which means injuring enemies must be done creatively. As a result, there are over 300 takedowns in the game in which the environment is used to eliminate threats.



Screenshot from Robert Ludlum's The Bourne Conspiracy

"Kismet allowed us to create the takedowns and the fighting system," explained Levatino. "We have hundreds of iterations of certain assets in the game. All of our props are destructible, and everything in the environment can be used as a takedown. Unreal Engine 3's prefab system helped immensely with that.

"Kismet really changed the way we make games. Tools like the animation system, the character system and the package and asset pipeline have all been good for us."

The *Bourne* cover system was based on the *Gears of War* cover system, but High Moon modified it to fit the tone and pace of the game. "All of the takedowns work through the cover system," added Levatino. "We recognised early on that all of our takedowns are based on walls or something waist-high like a desk or railing. The cover system detects what type of object you're against, and it allowed us to tag these takedowns across every square inch of a level."

Unreal Engine 3 also enabled High Moon to gear up development for a simultaneous release for Xbox 360 and PlayStation 3. "Launching simultaneously across platforms is always difficult no matter what your platforms are," added Valdez. "Unreal Engine 3 certainly made it that much easier to do. In addition, 99.9 per cent of the assets in the game are exactly the same on both consoles."

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__Mark Rein__ is vice president of Epic Games based in Raleigh, North Carolina. Since 1992 Mark has worked on Epic's licensing and publishing deals, business development, public relations, academic relations, marketing and business operations.

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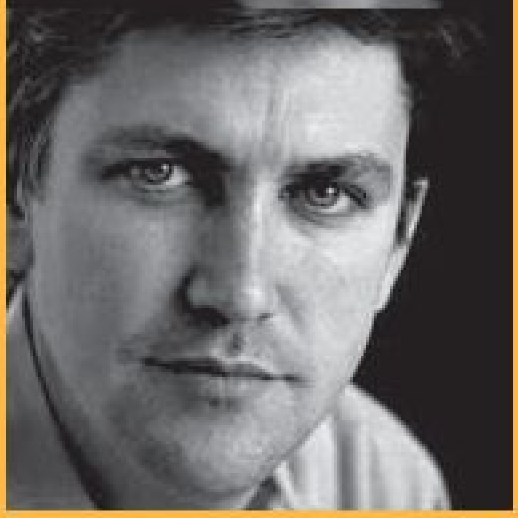
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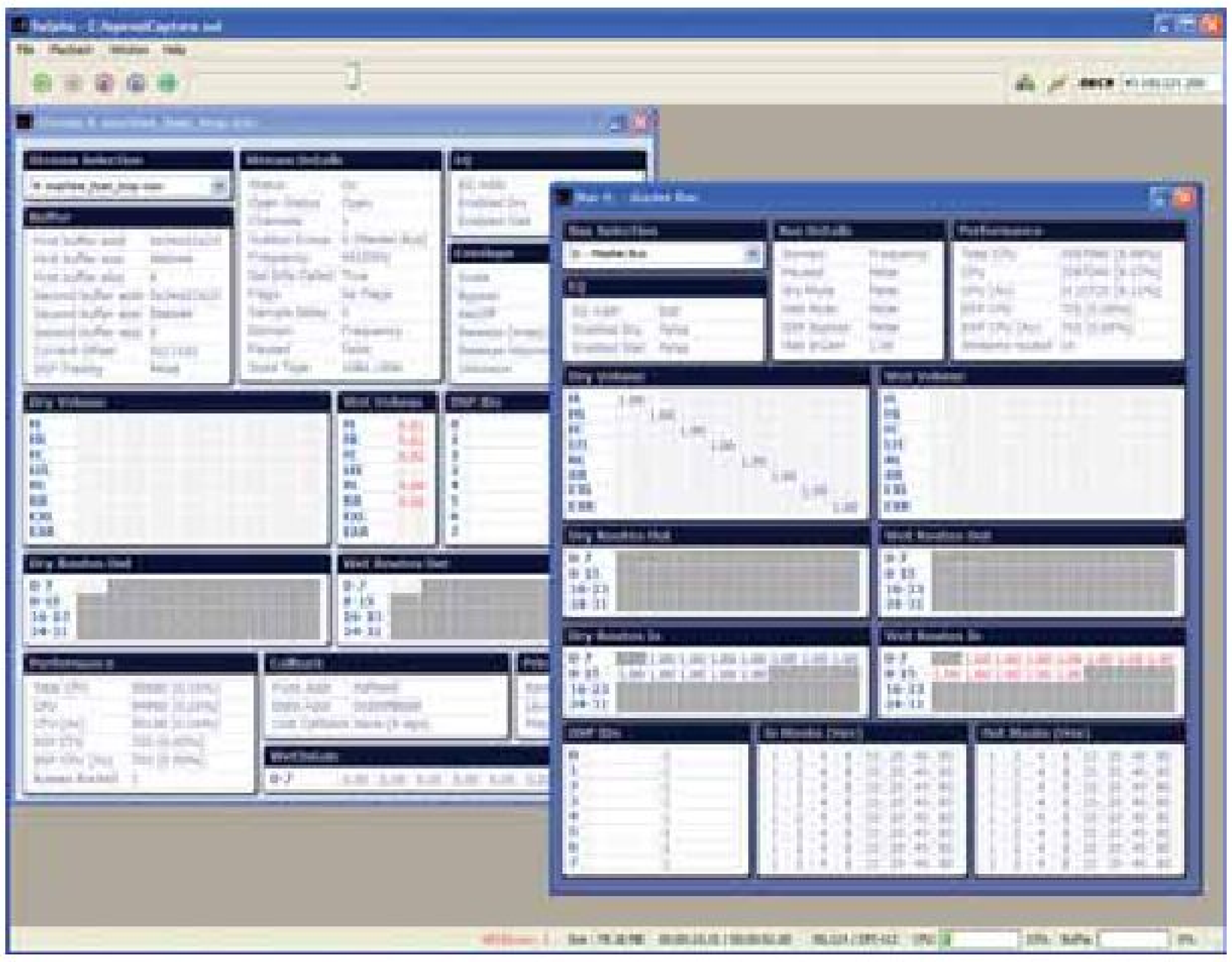
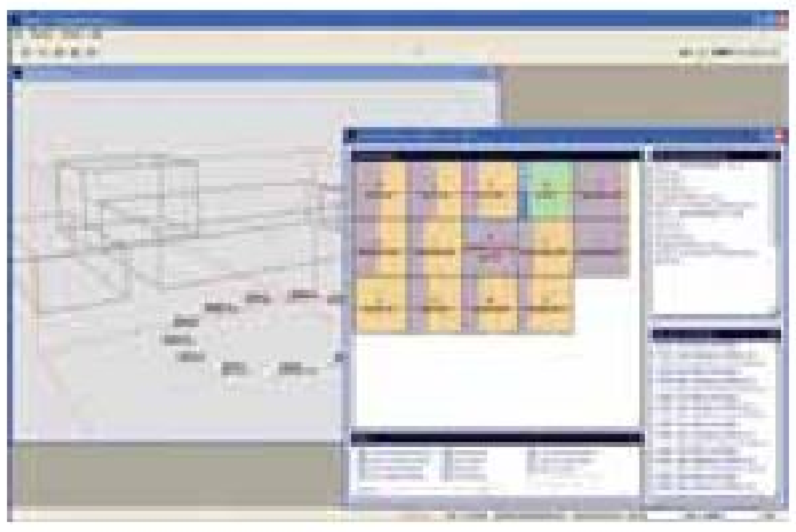
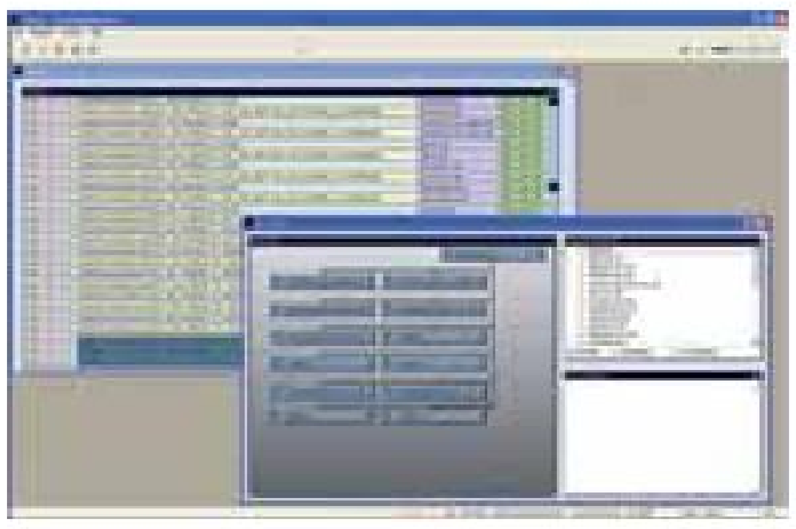
Sulpha, so good

John Broomhall talks to Sony Computer Entertainment Europe's senior engineer Oliver Hume about the company's new audio tool, Sulpha…







It's now three years since the coding team behind PS3 audio graced the first Develop conference *en masse* for an exciting audio track session which saw them emerge from behind closed doors to talk publically about their pioneering work.

As senior member of audio manager Jason Page's crack team, Oliver Hume has played a key part in that story, developing the train tracks on which our audio work for PlayStation runs. He has a continuing role of developer support and the provision of vital tools to harness that now 'current-gen' raw power for the delivery of ever more sophisticated music, sound and dialogue. So how does he feel the PS3 audio tech has bedded down – and are developers fully realising the power of PS3 for sound?

"It's bedded down well," he says. "Audio developers have got the hang of the SPUs and we're increasingly seeing more advanced applications – for instance, Codemasters have started using Ambisonics. This kind of CPU-hungry processing is now possible!

"We've been impressed with DSP usage. Originally, we saw 'vanilla' DSPs – one reverb per area, compressor at the end etc. Now we're seeing multiple reverbs to simulate reflections from all directions giving a much richer experience with people routing sounds through multiple reverb rooms correctly, so the effect of each reverb as raytraced to the player is accumulated properly. Then there's the use of DSPs at stream level – filters on every single sound playing, giving the audio a much more natural feeling, for example. We aim to continue enabling audio designers, giving them the technical freedom for their creative needs with virtually 'limitless' channels and DSPs."

All well and good, but clearly many developers still opt for a common cross-platform solution with an inevitable 'lowest common denominator' factor. Hence the importance of tools which provide greater hardware access making it quicker and easier to push the envelope. Add to that an open-source, open-format philosophy allowing porting to other platforms, and one can see the possibilities that these tools can help raise the overall quality bar.

Enter Sulpha – a high level MultiStream PC based debugging audio tool. Hume explains that Sulpha is designed to let users debug every part of MultiStream with ease: "Developers often have problems balancing their in-game levels – monitoring dozens of individual bus routes, the master balance and their mix down balance. Only one route needs to run hot for the whole game to sound clipped and distorted. Then there's balancing the SPU load of MultiStream, especially when using a lot of heavy-duty DSPs. Sulpha lets you see the exact SPU processing cost of each stream and bus in real-time."

> ***"For future engines we're going to release the source code which can be ported to other platforms…"***
>
> ***Oliver Hume, SCEE***

All of which should speed up development. Previously when a developer reported a problem, there would be a period of enquiry about their setup, and usage of MultiStream. Now they can attach a Sulpha capture with their initial bug report and the Sony team have all the information they need for diagnosis and resolution.

"Sulpha exposes all the workings of MultiStream," adds Hume.

"With minimum changes the developer can connect the PC tool to their running instance of MultiStream and capture every single piece of data used," he continues. "They can then step through and watch the effects of each instruction called on the various parts of MultiStream - in the same way as a code debugger.

"The audio data of every stream playing is captured together with all mixing buses in real-time allowing a developer to listen to each of their assets as played through MultiStream. They can hear the before/after effect of their DSP chains and monitor the levels of every one of their buses and the final down-mix. API usage can be viewed, as can the order of calls – and you can see any functions that returned an error code. You'd be surprised at the number of bug reports where the developer isn't checking error returns! Finally, you can view a 3D spatialization of your surround to quickly see if sounds are grouped correctly."

Hume believes the new tool will have a tangible effect on quality by reducing the time required to debug audio, thereby freeing up development time for polishing and implementing features. Meanwhile, being able to get at the sub-bus feeds means non-programming audio guys can check various audio portions easily, and seeing accurate resource-usage reports may uncover spare capacity for extra trickery such as mastering EQs, compressors, soft limiters and so on.

Hume is keen that the tool gets the most use possible, even on non-Sony systems: "As far as the cross-platform angle goes, we're acutely aware that people aren't using MultiStream to its full potential, due to that old 'lowest common denominator' phenomenon. With our future engines we're going to release the PC based source code as well, which developers can port to other platforms."

Sulpha will be available for PlayStation 3 registered developers within the year. Also, look out for other future tool releases including Awesome – Sony's next audio scripting solution – and modular based synth engine, Fusion.

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Resolve your resolves

It's easy to lose track of how many resolves are being performed in your post-processing framework, say AMD's **Jon Story** and **Holger Gruen** – and you'd be surprised how much it can slow things down…

< ART >

TUTORIAL:
POST-PROCESSING EFFECTS

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Over the last few years it has become common place for PC games to make use of Multi-Sample Anti-Aliasing (MSAA) to achieve higher quality rendering. MSAA is a very effective and efficient method for reducing the unsightly 'jaggies' that result from the triangle rasterization process. At the same time, most game engines also employ post processing techniques such as depth-of-field, motion blur, colour correction and refraction. Post-processing has become increasingly popular, as it provides a way to carry out complex computations, but only pay the cost for visible pixels. It is not unheard of for an engine to contain up to 20 passes, and these techniques usually require a copy of the main render target as a texture input. If the engine is making use of MSAA, then the render target will need to be resolved before it can be used in the next pass. This is accomplished through calls to IDirect3DDevice9::StretchRect or ID3D10Device::ResolveSubresource, depending on which version of Direct3D is being used. As modern game engines tend to apply multiple post-processing techniques, it is easy to understand how the application could trigger a loop of resolves, as shown in Figure 1.

> ***"It is critically important to understand that a resolve is not a free operation, and that performing multiple resolves per frame can have a very serious impact…"***

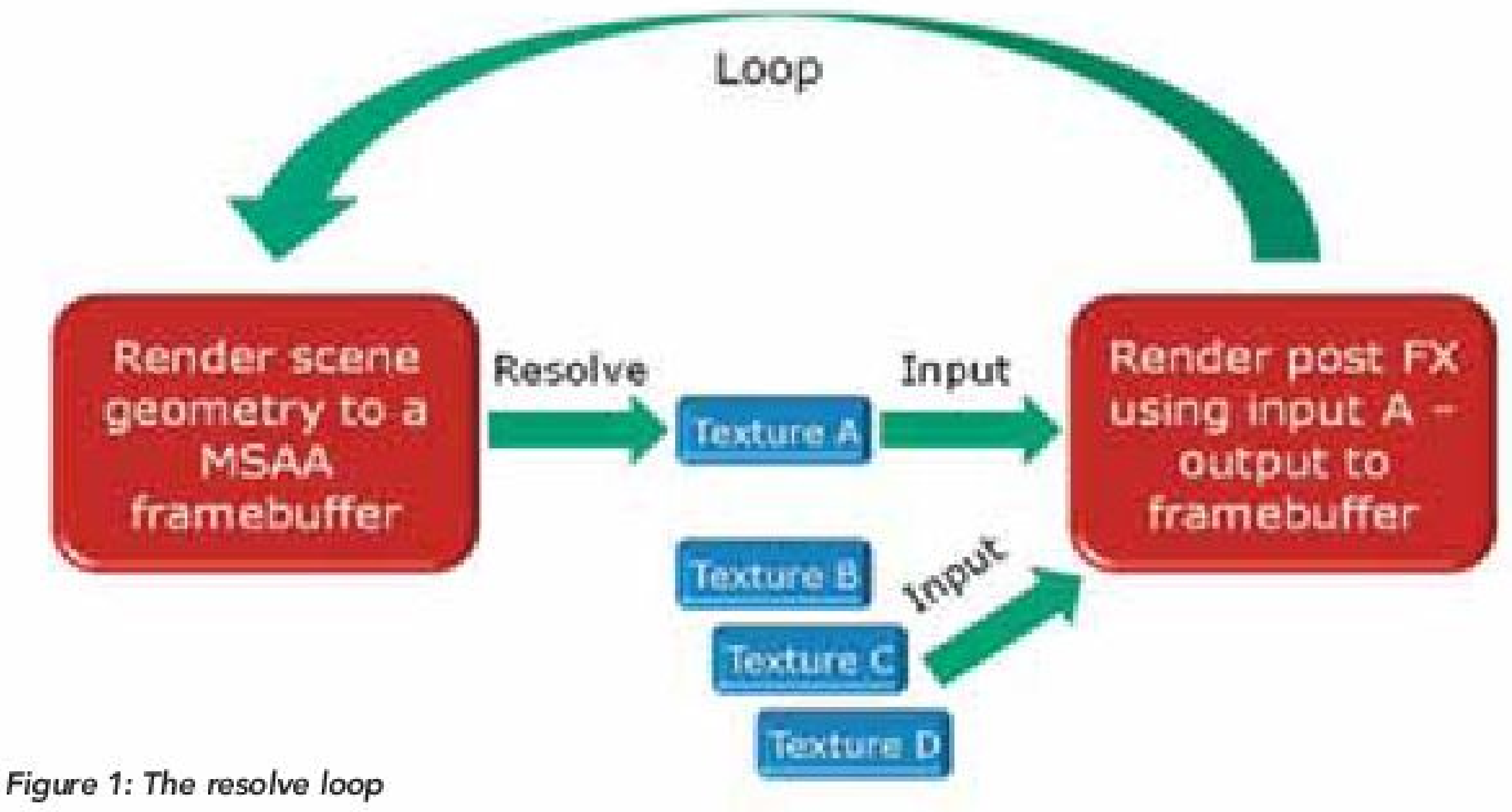
Loop
Render scene geometry to a MSAA framebuffer
Resolve
Texture A
Input
Render post FX using input A – output to framebuffer
Texture B
Texture C
Texture D
Input

Figure 1: The resolve loop

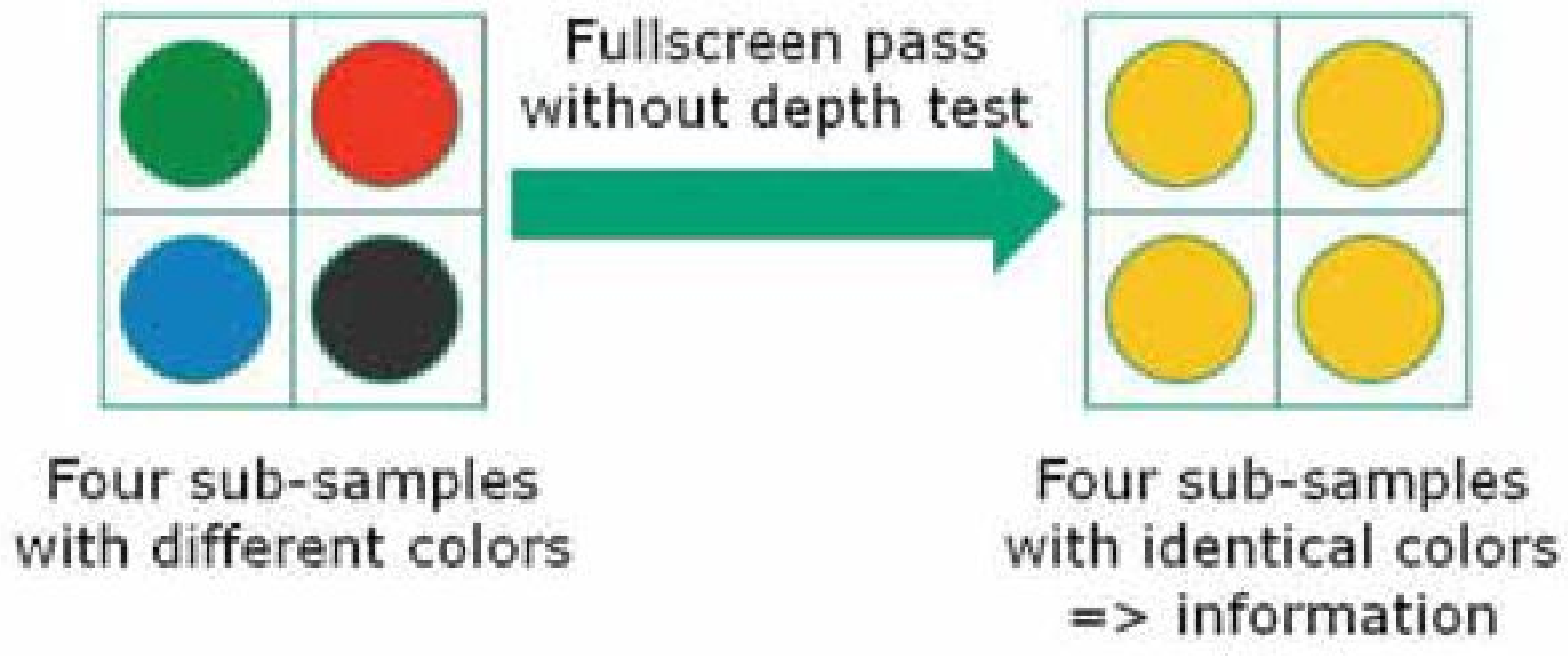
Fullscreen pass without depth test
Four sub-samples with different colors
Four sub-samples with identical colors => information loss!

Figure 2: Full-screen pass

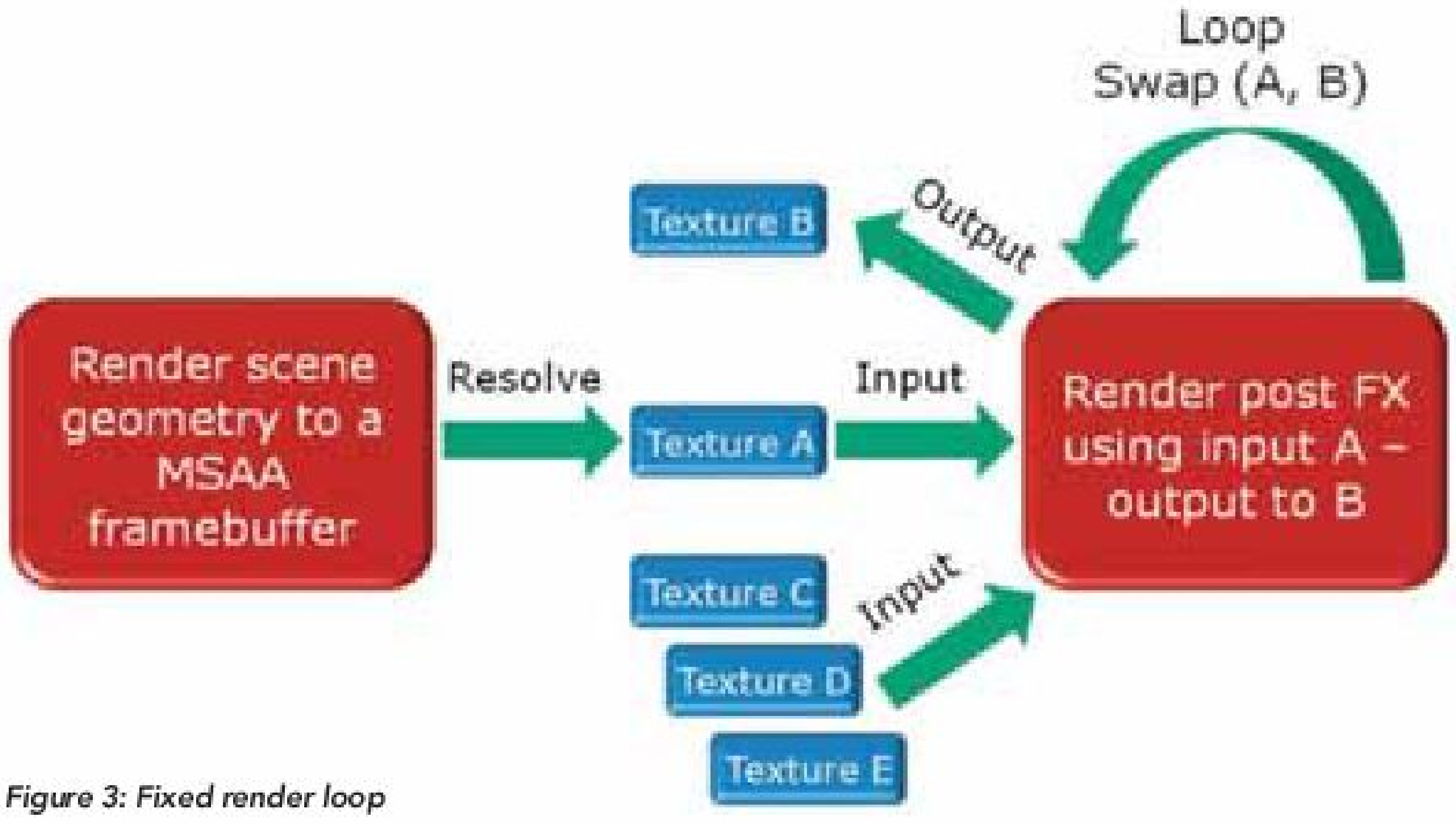
Loop
Swap (A, B)
Texture B
Output
Render scene geometry to a MSAA framebuffer
Resolve
Texture A
Input
Render post FX using input A – output to B
Texture C
Texture D
Texture E
Input

Figure 3: Fixed render loop

It is critically important to understand that a resolve is not a free operation, and that performing multiple resolves per frame can have a very serious impact on performance. This statement is true for all graphics hardware. To take a real world example, the developers of a recently released PC title managed to reduce their resolve count from a staggering 22 to just 12. This generated a saving of around 12 ms per frame, at a resolution of 1280x1024 with 4xAA.

The goal of this paper is to describe how to minimize the resolve count in the rendering pipeline without compromising the quality of post-processing effects or deferred shading techniques. The resolves that should be removed fall into two categories: redundant resolves and harmful resolves, and these will be described in detail later. But first, let's consider the resolves that are necessary for good image quality.

Useful Resolves

We know that the use of MSAA render targets is only helpful when draw calls produce visible jaggies. In an ideal world the main geometry pass would be rendered in MSAA mode, and then resolved to a non-MSAA render target. Any subsequent post processing passes would all be completed in non-MSAA mode. This would therefore give rise to just a single resolve per frame.

There are, however, two reasons why a post processing technique may need to be performed in MSAA mode:

1. If a post processing technique enables subsample based depth testing, it can result in an update to some of the subsamples of a pixel.
2. In a similar way, if alpha blending is enabled, then subsample data is preserved through the blend operation.

In these cases it does indeed make sense to resolve the render target for further passes. However, these two examples are the exception and for full screen passes that do not enable depth testing or alpha blending, there is precious little point in using MSAA mode.

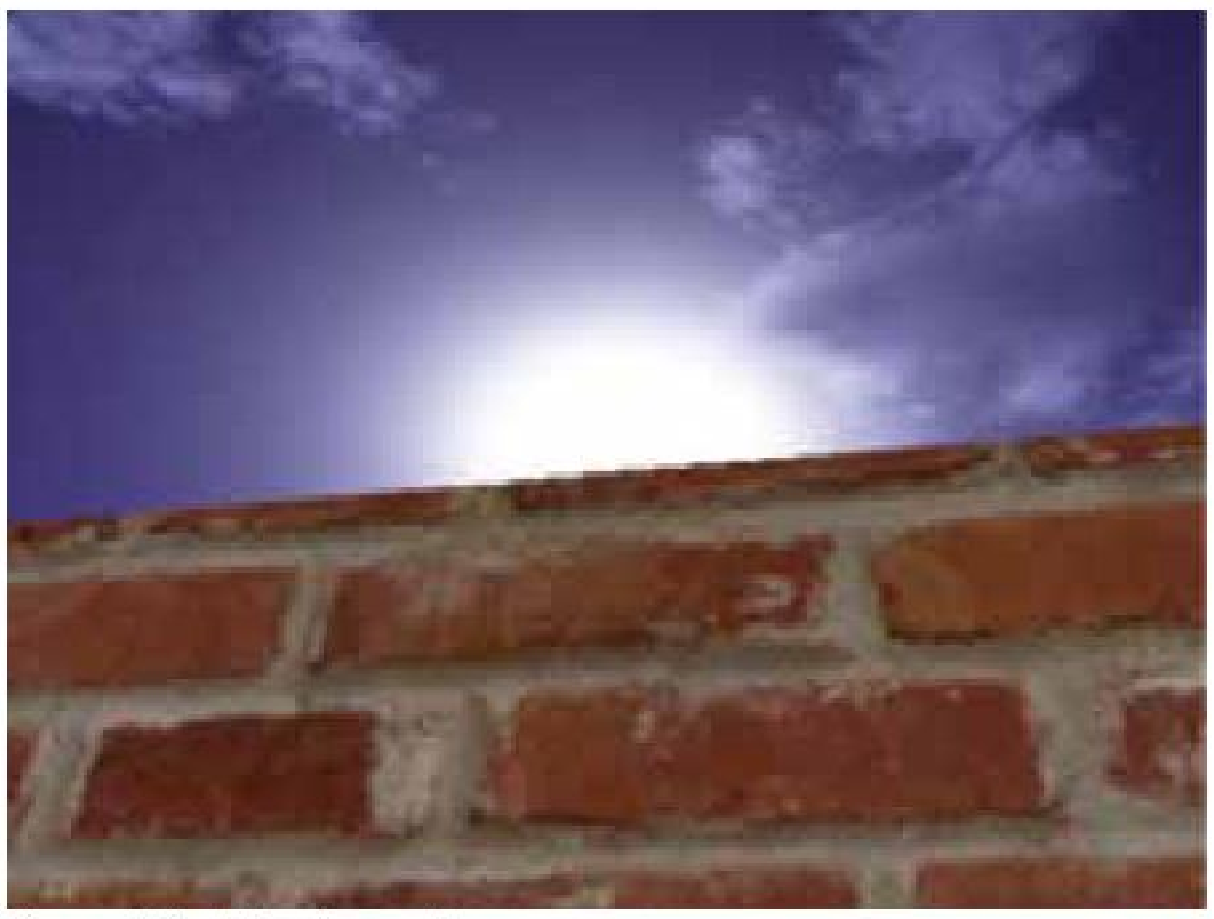

Figure 4: Fixed function resolve

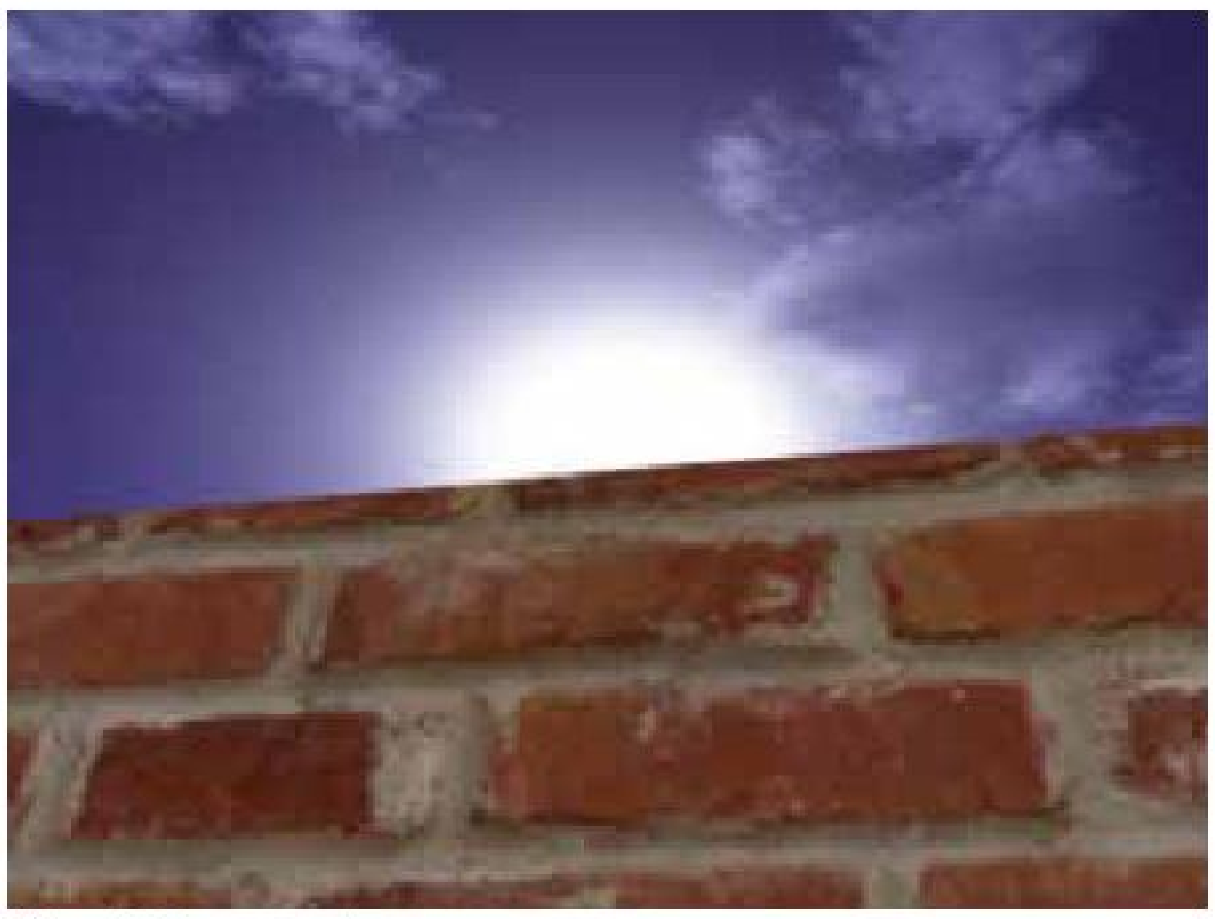

Figure 5: Custom resolve

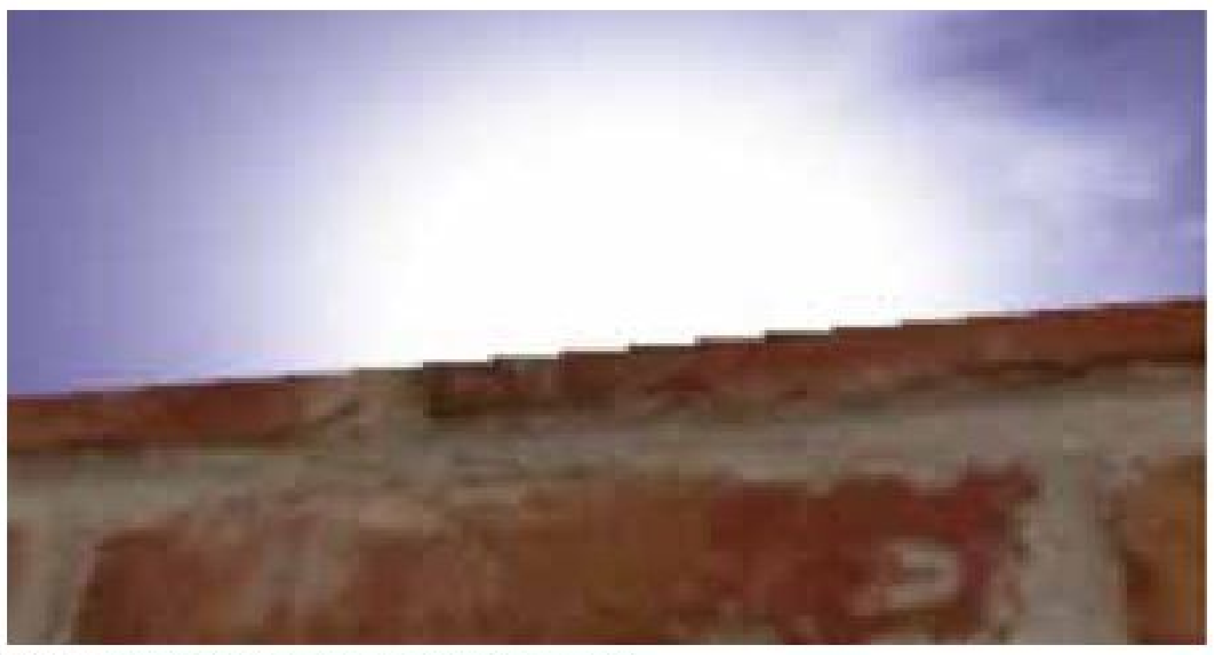

Figure 6: Fixed function resolve (zoom in)

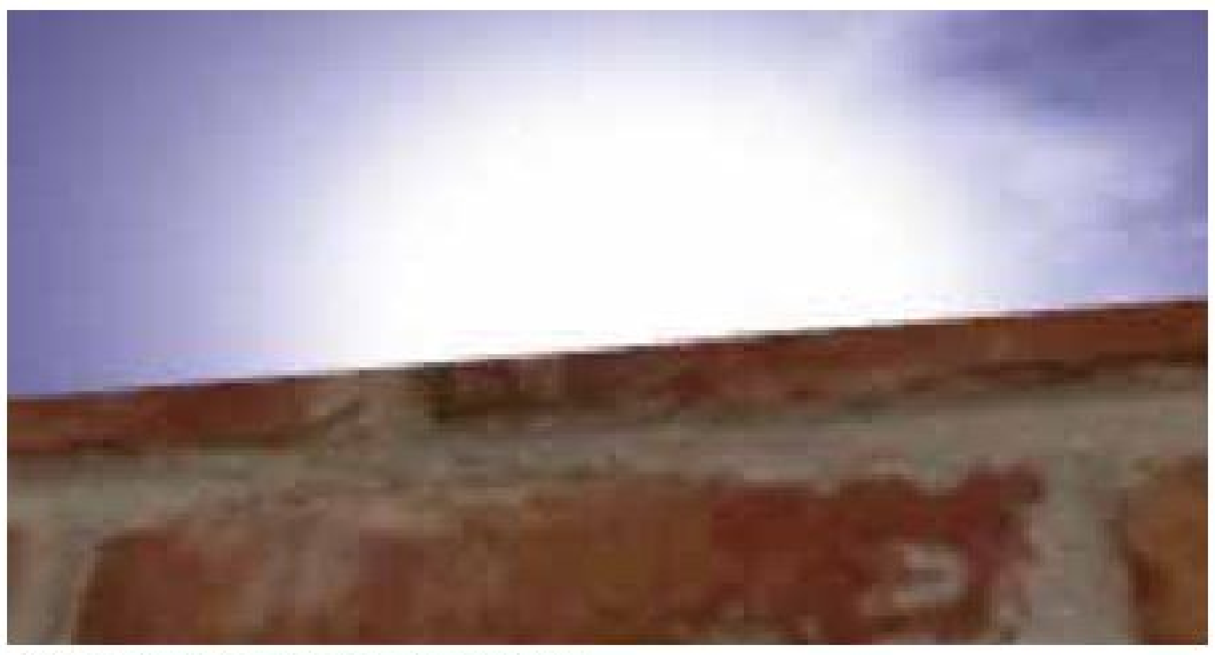

Figure 7: Custom resolve (zoomed in)

REDUNDANT RESOLVES

A technique that does not actually draw any geometry, other than a full screen quad, will usually write the same color to all subsamples in a MSAA render target as depicted in Figure 2 (*previous page*).The reason for this is that the pixel shader is only run once per pixel and the whole pixel is covered. Effectively the MSAA buffer has been turned into a non-MSAA buffer, and every further resolve operation on this surface is redundant. Aside from the obvious redundancy, once the same color has been written to all subsamples of the corresponding pixels, note that the MSAA depth buffer does not actually match the silhouettes of the objects anymore.

Clearly the solution is to render these passes in non-MSAA mode, thus completely avoiding the need to perform resolves. The recommended way to avoid these unnecessary resolves is as follows:

1. Create the main frame buffer (swap chain) in non-MSAA mode.
2. Create an intermediate MSAA render target where the main scene geometry is rendered, and anything else that would result in jaggies.
3. Perform a resolve of the intermediate MSAA render target to a non-MSAA surface.
4. Ping pong between non-MSAA render targets for the remaining passes as shown in Figure 3 on the previous page.

To add a real world example to this discussion, the following sequence of passes was uncovered during the analysis of a recently released PC title:

1. Render the geometry pass into the main MSAA render target M
2. Resolve M into a non-MSAA render target A
3. Render A on to M using a full-screen quad
4. Resolve M into A
5. Render water to M
6. Resolve M into A for further post-processing

It is fairly obvious from an initial glance at this sequence, that steps 2 through 4 are totally redundant. In fact step 3 is actually harmful from a quality stand point, as it destroys the subsample color information. Clearly it is possible to jump directly from step 1 to 5, having removed no less than two resolve operations, while maintaining the subsample color information.

> **"Needless resolves can come about because modern engines are highly object orientated, and because several developers can be making changes to the rendering code over time..."**

So why would the developer fail to spot this? The answer lies in the fact that modern engines are highly object oriented, and that several developers are making changes to the rendering code over time.

Apparently, step 3 was originally a valid post processing effect, and when it was changed, it effectively became just a copy operation which made steps 2 and 3 redundant. The resolve in step 4 was triggered because M was accidently added as an input to step 5.

As you can see, it is very easy to introduce redundant resolves into the rendering pipeline. It always pays to be on top of the various passes carried out during a frame, and is generally good practice to regularly inspect PIX dumps for unexpected behavior.

HARMFUL RESOLVES

It is common for deferred rendering techniques to store information such as depth, position, normal, velocity and material ID to an intermediate render target. If this is carried out in MSAA mode, then the data would need to be resolved before being put to use later in the frame. The problem here is that the fixed function resolve operation will simply perform an average of the subsamples. This is very unlikely to yield the developer's intended result, and will most probably result in graphical artifacts.

Let us consider the case where material IDs are to be resolved. I think we would all have to agree that averaging material IDs is never going to make any sense, and that performing such an operation would, in a worst case scenario, produce invalid IDs.

So how should we deal with this kind of data, when a standard fixed function resolve is clearly not the way to go?

In DX10 it is possible to write a pixel shader that can read the subsamples of an input texture. In the case of a deferred lighting technique, it would then be possible to accumulate all lighting calculations on each subsample, and then finally average the results. In this way the shader has effectively performed a custom resolve. DX10.1 capable hardware removes a further limitation by allowing access to the subsamples of the depth buffer, which can eliminate the need for a separate depth pass.

Another prominent example of a technique that suffers from using fixed function resolved data is non-linear tone mapping. The only correct way to perform tone mapping in a multi-sampling context is to tone map every subsample using a shader based custom resolve. Figures 4 to 7 clearly show the quality difference between a fixed function and custom resolve operation, especially when edges of high contrast are considered.

In DX9 it is not possible to do this, so it may be that the resulting artifacts have to be tolerated, although it should be said that the implementation of explicit super sampling could achieve similar results. For performance reasons it may be necessary to carry out post-processing with data produced by a harmful resolve, though this should be kept to a minimum.

CALL TO ACTION

It is very important to appreciate that a resolve is not a free operation – in fact it is a decidedly expensive procedure, and should therefore be kept to a minimum. Keep in mind that most resolves are either redundant or harmful. To avoid redundancy, remember to resolve the main MSAA render target as early as possible, and then work in non-MSAA mode for post processing effects. Write shader based custom resolves, to properly deal with high quality post processing and deferred rendering techniques. Remember that it's easy to over look what is really happening among the various rendering passes, so regular analysis is essential to resolving your resolves!

FEEDBACK

We would welcome your feedback on any aspects of this paper, as well as any recommendations you may have for how we can better support developers with regard to this topic. Please send your feedback to: **jon.story@amd.com** or **holger.gruen@amd.com**.

Jon Story *is a member of the European Developer Relations team at AMD GmbH in Munich. The main focus of his work is supporting game developers in Europe to get the best out of AMD's graphics products.*
Holger Gruen *ventured into 3D real-time graphics writing fast software rasterizers in 1993. He got into developer relations recently and now works for AMD's graphics products group.*

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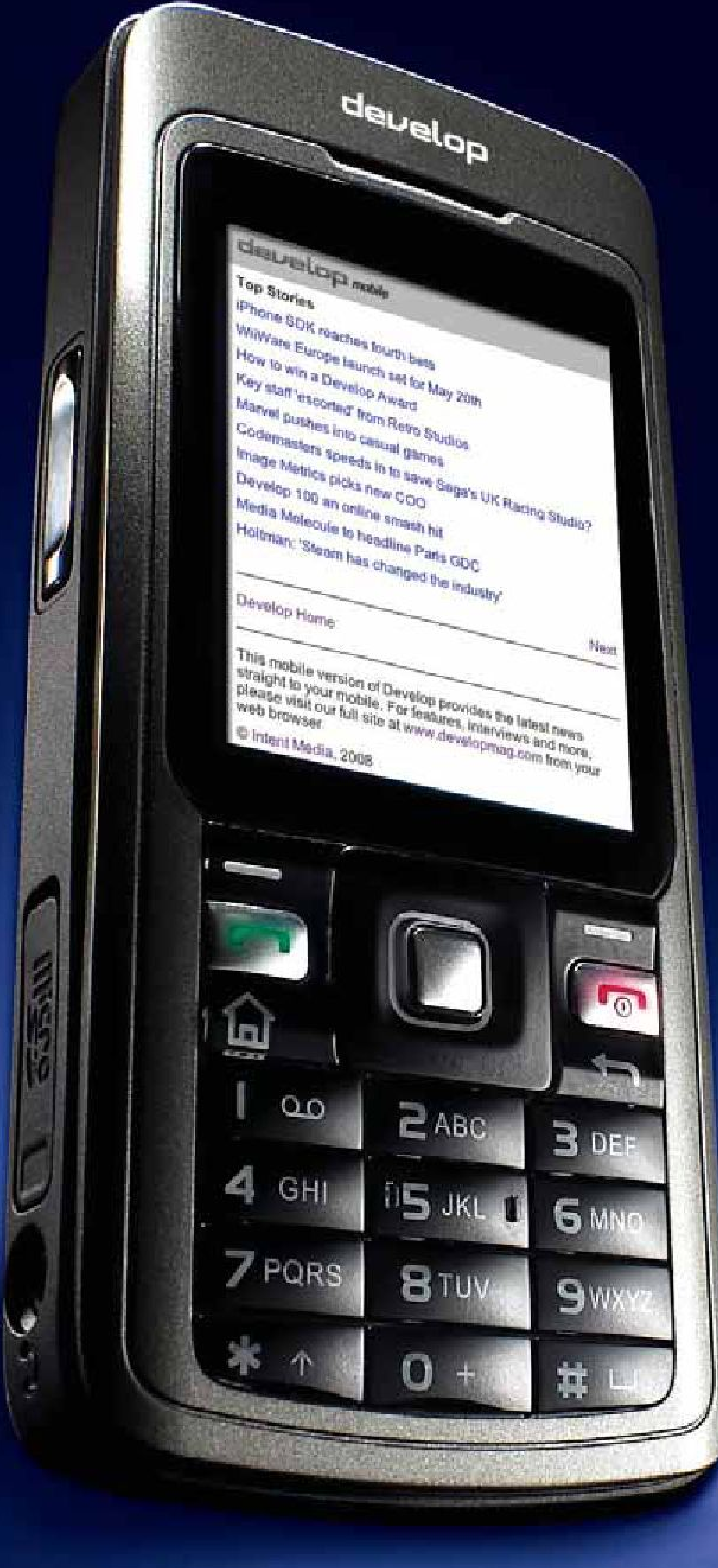

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Studio News

This month: Gusto, Creative North and Midway

Gusto's relentless expansion has, once more, added even more staff to its bulging roster, this month seeing a whopping 14 new inductees joining the team.

They are (*front row, left to right*): Jack Ward Fincham, John Payne, Tom Bailey, Adam Chilton, Steven Loveridge, Jinyang Li, Alessandro Ciucci, Pierre Gufler, Terry Drever, (*back row, left to right*): Russell Newman, Omar Kahn, Paul Gordon, Gonzalo de Santos Garcia and Robert Padilla.

"This month has seen 14 new recruits join Gusto Games which has resulted in the company taking on additional office space within its Banbury HQ," said Gusto Games' development director Steve Archer.

"We have managed to entice top talent from the likes of Sega and Electronic Arts this month which has bolstered our art, coding and production teams. We still have a number of vacancies to fill on a new Xbox 360 and PS3 project that is starting in August so the recruitment drive continues."

www.gustogames.com

Craig Albeck, former project manager at Yorkshire development trade body Game Republic, has left to pursue a career in development, joining Huddersfield-based studio **Creative North** as business development manager.

The studio primarily works on mobile games and applications, but is in the process of moving into development for the ever-popular DS, and also does work in Flash and in the 3D art and animation sphere as well. It's worked with clients including Player X, Selatra, CBBC, Orange and Hasbro.

"I'm excited to be joining a company with a lot of expertise across the game development spectrum," said Albeck.

"The culture and atmosphere is well suited for potential new recruits that relish a challenge and have a genuine love for problem solving. It works for me since its local - 'Think Games. Think Yorkshire.' Creative North are an established developer in the mobile space but we are looking to press on and apply our expertise on other platforms, with the primary focus being Nintendo DS. I am looking forward to happy times ahead with the Creative North crew."

www.creativenorth.co.uk

Midway has appointed industry vet Craig Duncan to the role of studio head for its Newcastle development outfit.

Duncan joins the studio with over ten years of senior development management experience, having spent five years at Codemasters in various worldwide product development roles and most recently being the developer-publisher's director of product development.

He will drive development of Midway's upcoming *The Wheelman* in addition to all future products at the Newcastle studio, and will report to Matt Booty, Midway's SVP of Worldwide Studios and current interim CEO and president.

"We're very excited to announce the appointment of Craig Duncan as our Newcastle studio head," said Booty.

"We are confident that Craig's strong background along with his creative and technical expertise will further enhance the quality of upcoming games like *The Wheelman*."

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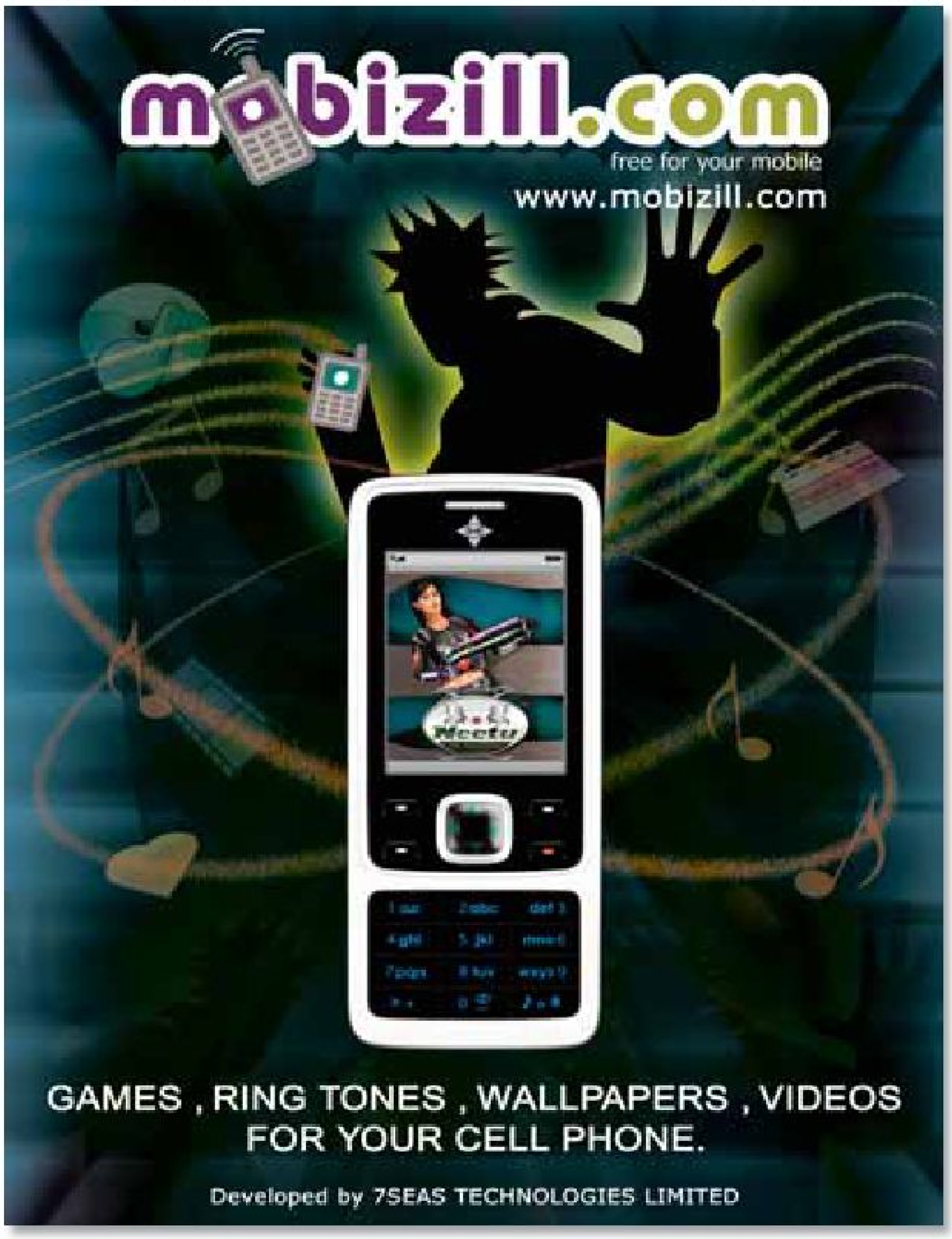

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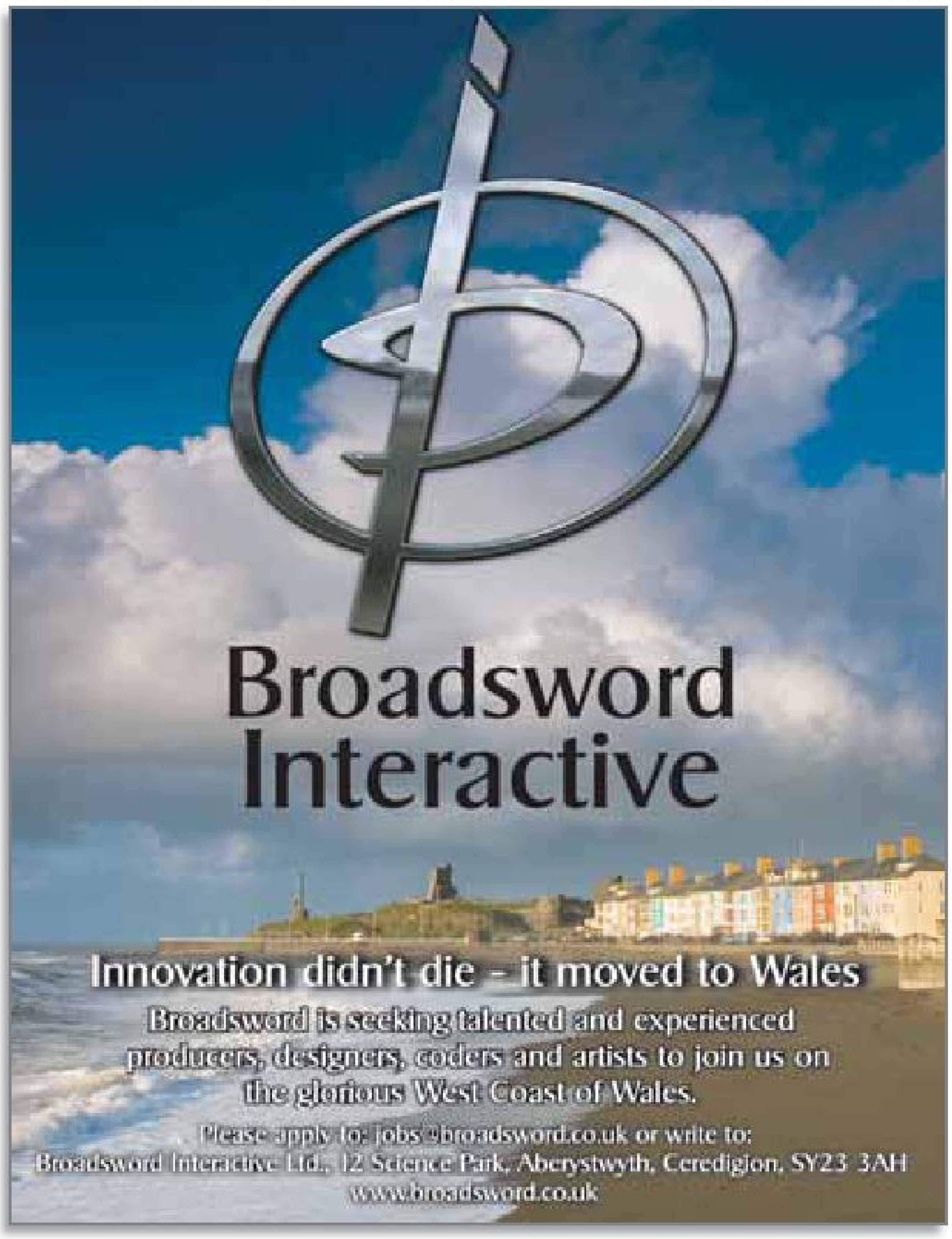
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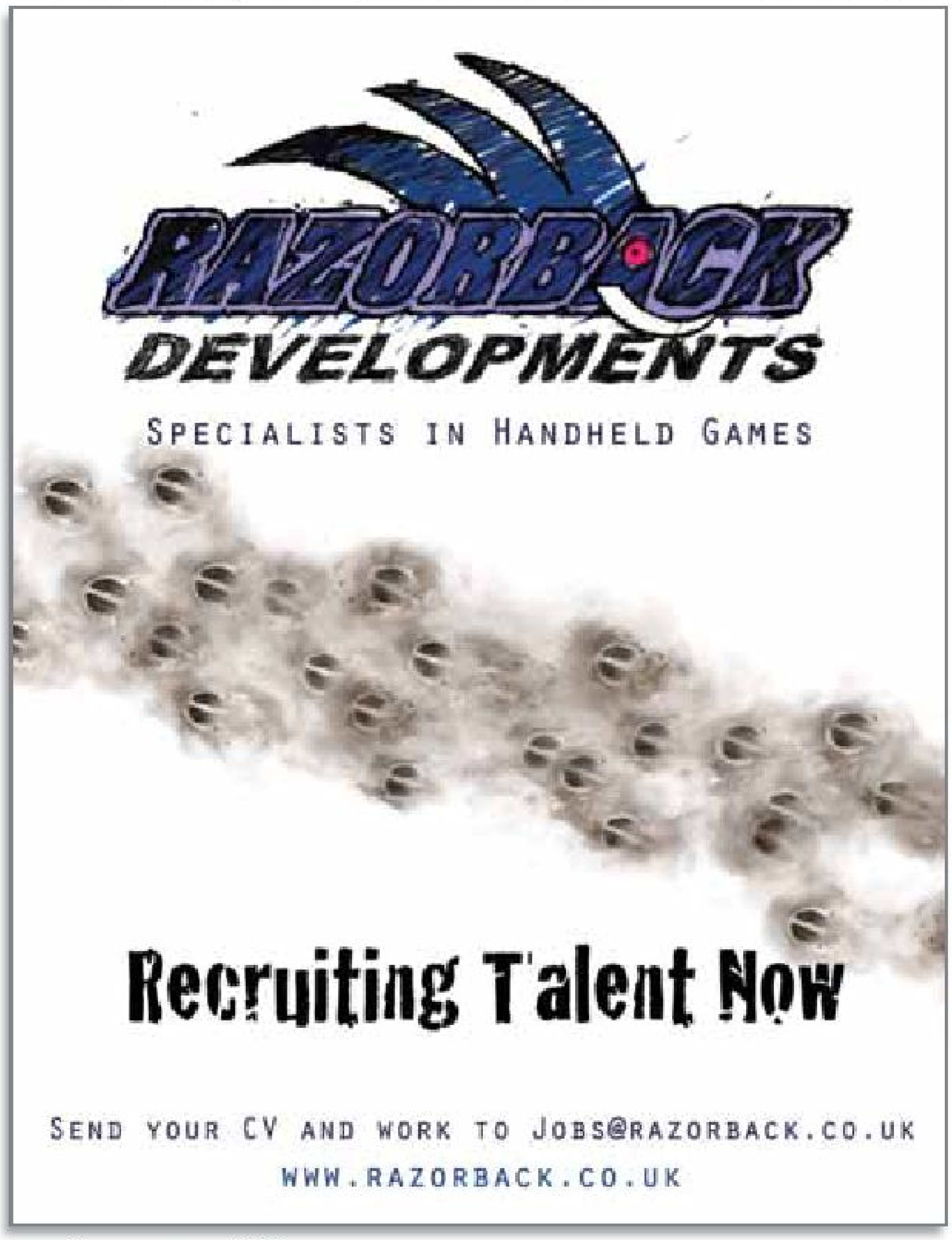

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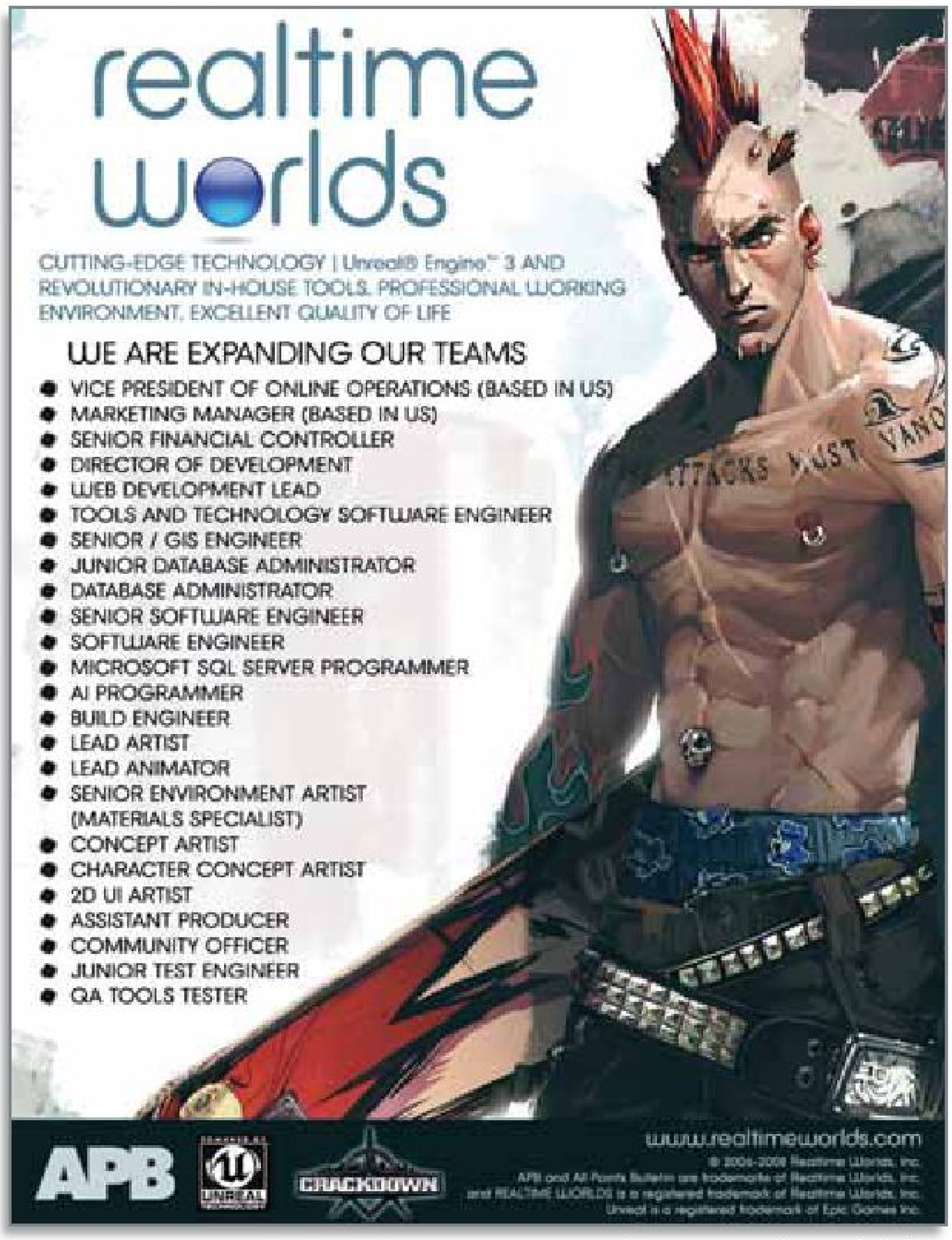

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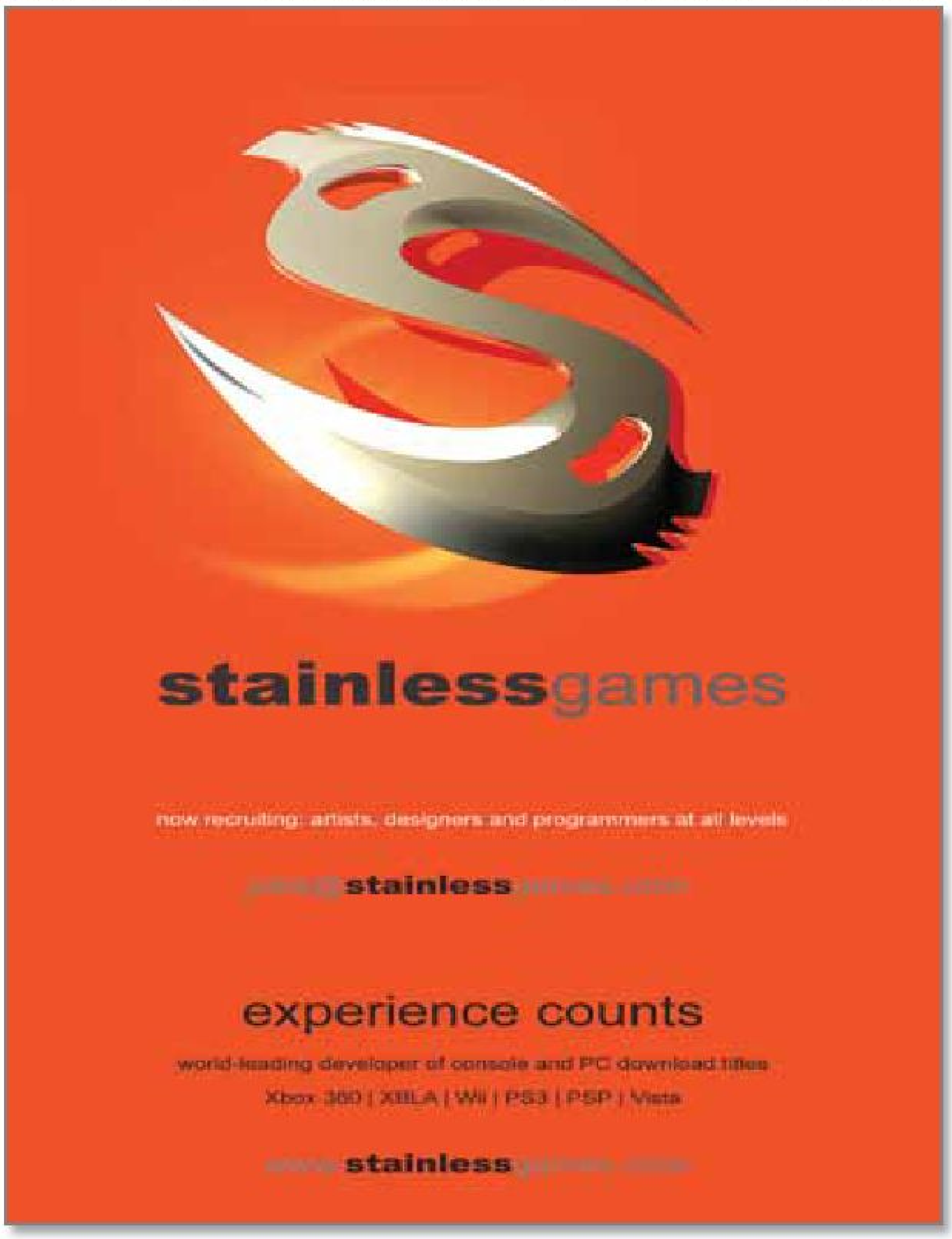
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Tools News

Emergent targets casual gaming market

Emergent is to address the growing casual games sector by providing a lower-cost license to the latest version of its Gamebryo game engine.

Speaking to *Develop* prior to the scheme's unveiling at Games Convention, Emergent CEO Geoffrey Selzer explained how the new pricing structure has come from observing the growth of the industry.

"Casual means a lot of things to a lot of different people. Casual developers are now doing games on Xbox Live and PSN and WiiWare, and what they're really trying to do is go after a new market, but they're still demanding the same type of technology. They're still going up against all of the same challenges that you do when you're launching a large-scale game. So this is our attempt to align our interests and the industry's interests."

But, posited Selzer, there's convergence between the traditional market and the casual market not just in terms of the class of game that developers want to create – as time goes on the demands of gamers will similarly rise.

"I think that you're going to see that that audience is going to have a great deal of demand about quality of visuals and quality of gameplay," he explained. "How do you access that market without some level of technology solution that enables a rapid evolution of content in that environment? I think that not only are you going to see greater acceptance of middleware [in that market], but also greater demand, so the real trick is to evolve the economic models that make sense for both sides."

In fact, the company thinks that the casual game development market has been entirely underserved when it comes to middleware.

"One of the things we wanted to make sure we did was that we didn't water down the technology but instead created custom pricing models and structures around it so that it fits their budget," said Emergent's marketing and communications manager Erin Dwyer. "They're not necessarily making less of a game, it's just that there's different constraints and obstructions in their way."

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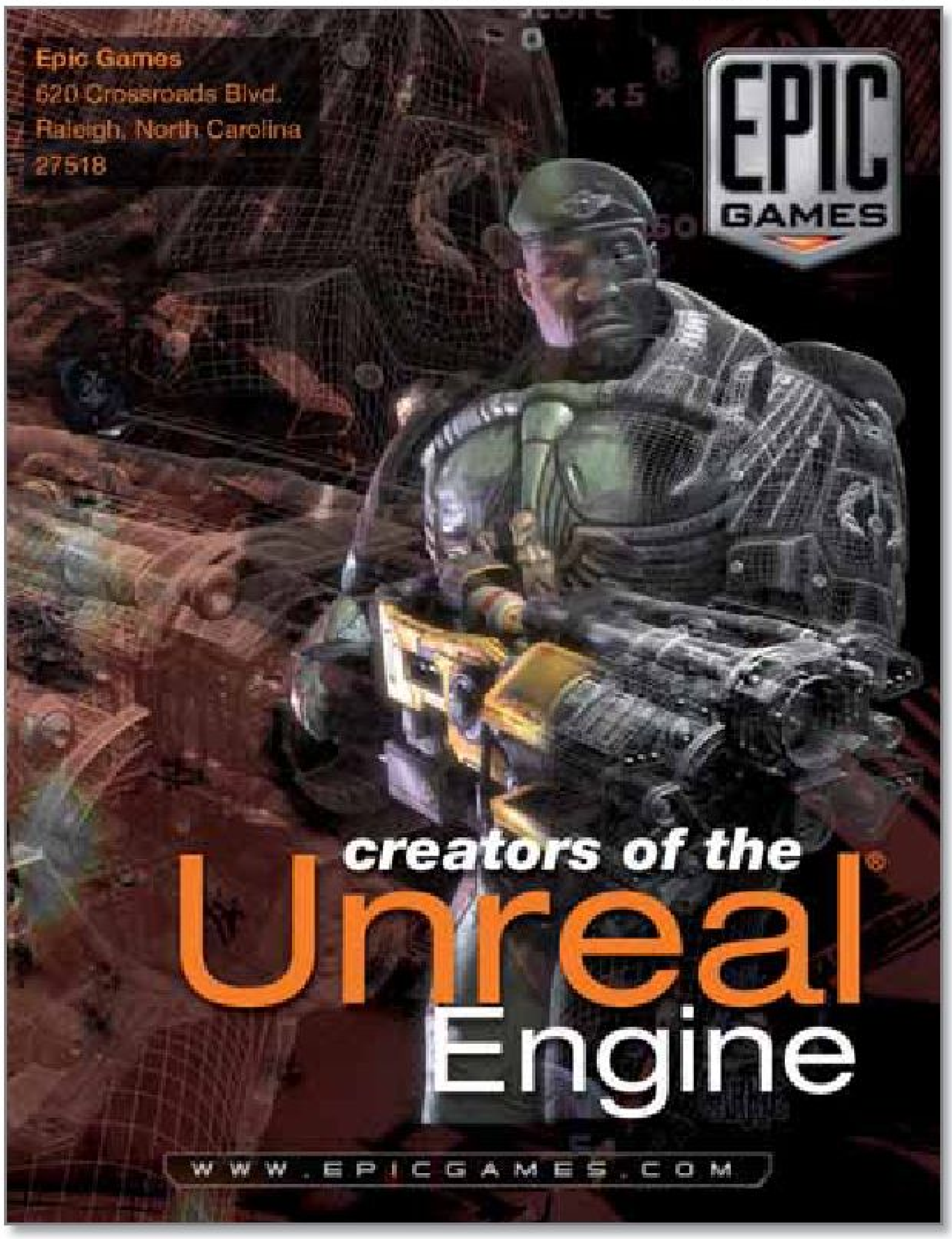

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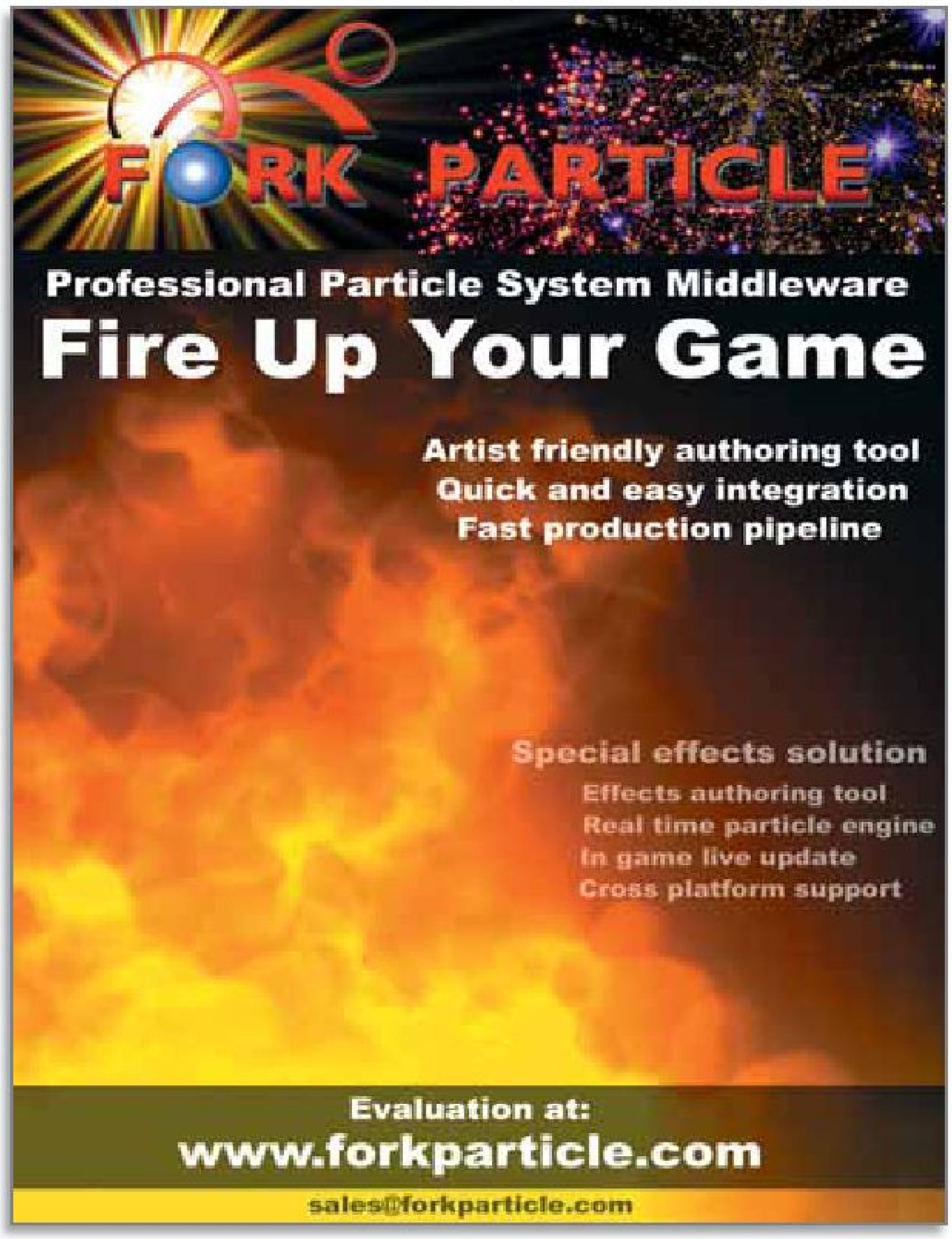
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Tool Spotlight

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In addition, the new On-Target Display functionality uses OpenGL and 3D acceleration cards to give an accurate real-time evaluation of the model. Not only that, but inter-operativity with 3ds Max and Maya has been improved and general performance enhancements have been made, especially to camera movement and brush speed.

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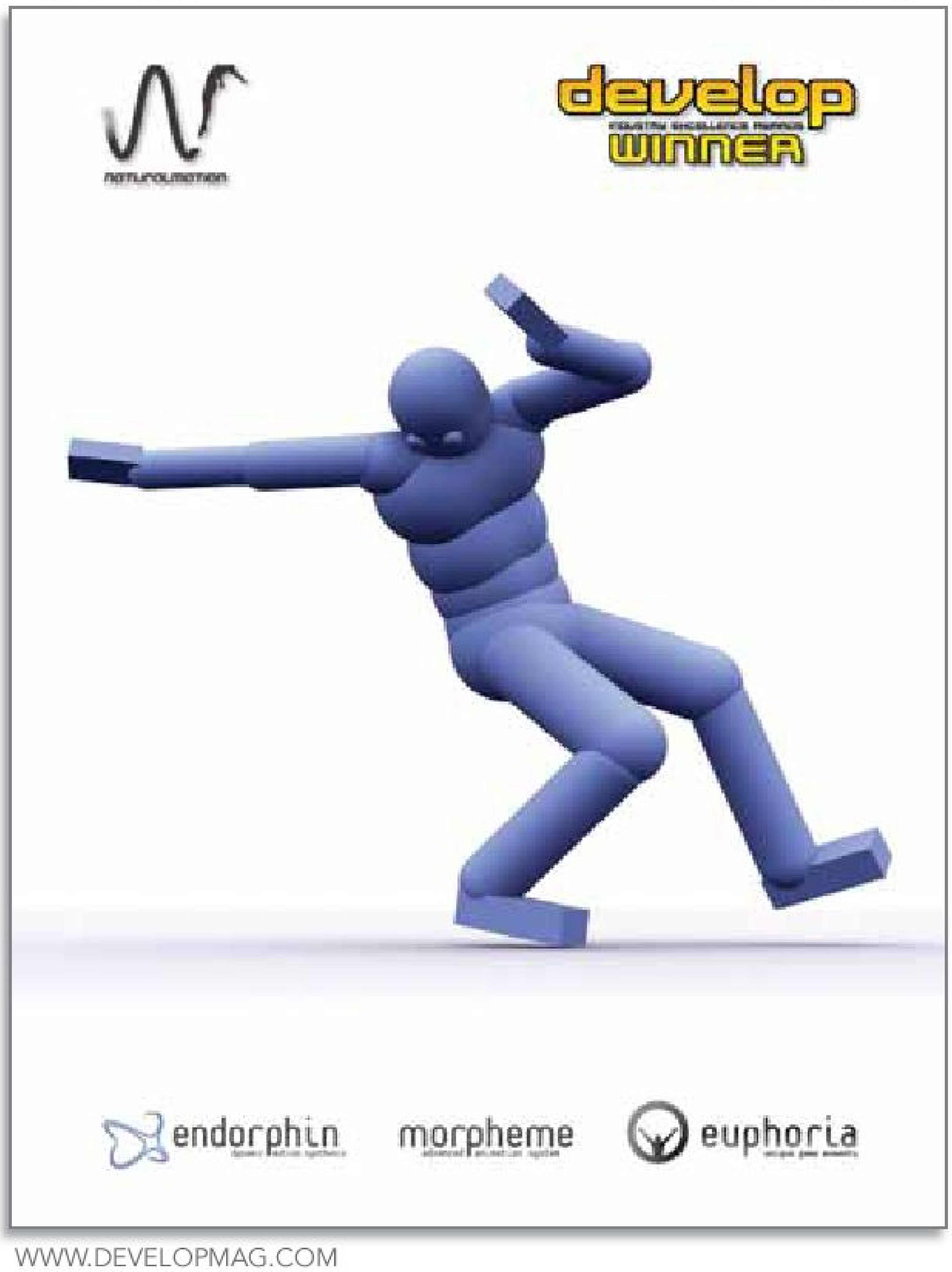
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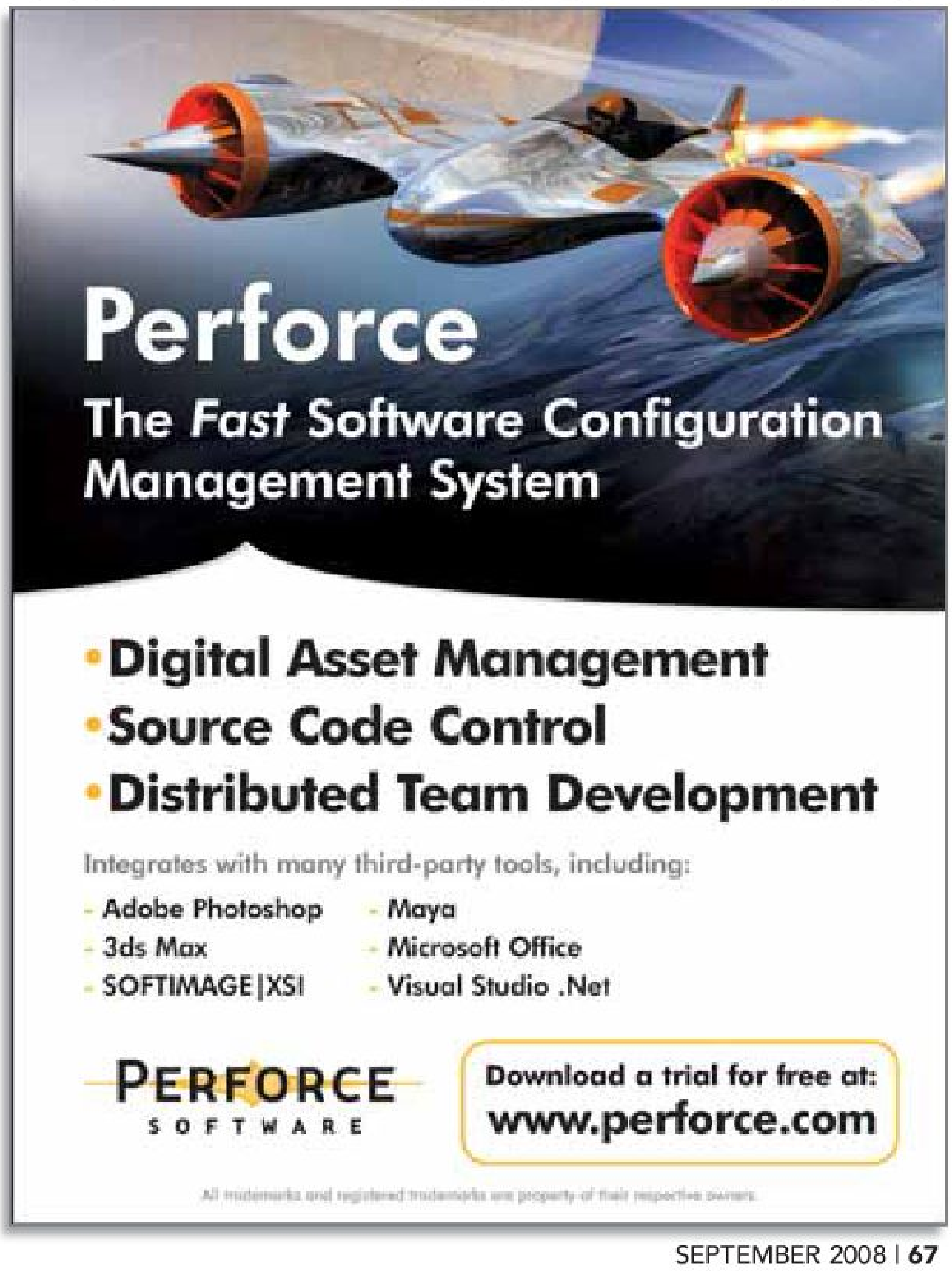
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Services News

Universally Speaking adds two new faces

Universally Speaking, previously Partnertrans UK, welcomes two new recruits into its ranks this month, as it hires a new marketing manager and localisation project manager.

Connie Armstrong joins the firm in the marketing position after a string of jobs in the record industry, including EMI, BMG and Polygram. Her role will be to oversee the company's marketing activities and 'help establish the new identity for Universally Speaking' after its recent rebrand from Partnertrans UK.

Meanwhile, Jean-Baptiste Bagot jumps aboard the US ship and dons the localisation project manager's hat after several years as language QA co-ordinator at Sega Europe.

"I'm delighted that Connie has joined my team," said Universally Speaking managing director Vickie Peggs.

"Connie's experience in the entertainment industry, handling corporate communications for major blue chips and overseeing target driven campaigns will firmly allow Universally Speaking to pursue its aggressive growth plans."

"Jean-Baptiste, meanwhile, brings an enormous amount of experience to our already established team. He has settled in quickly and has already become a highly valued member of my localisation team. I'm very pleased he has agreed to come on board."

The firm is also celebrating its nomination at the ME Awards 2008 in the Best Games Service Provider category. The awards take place at the Royal Garden Hotel in London on Thursday 25th September.

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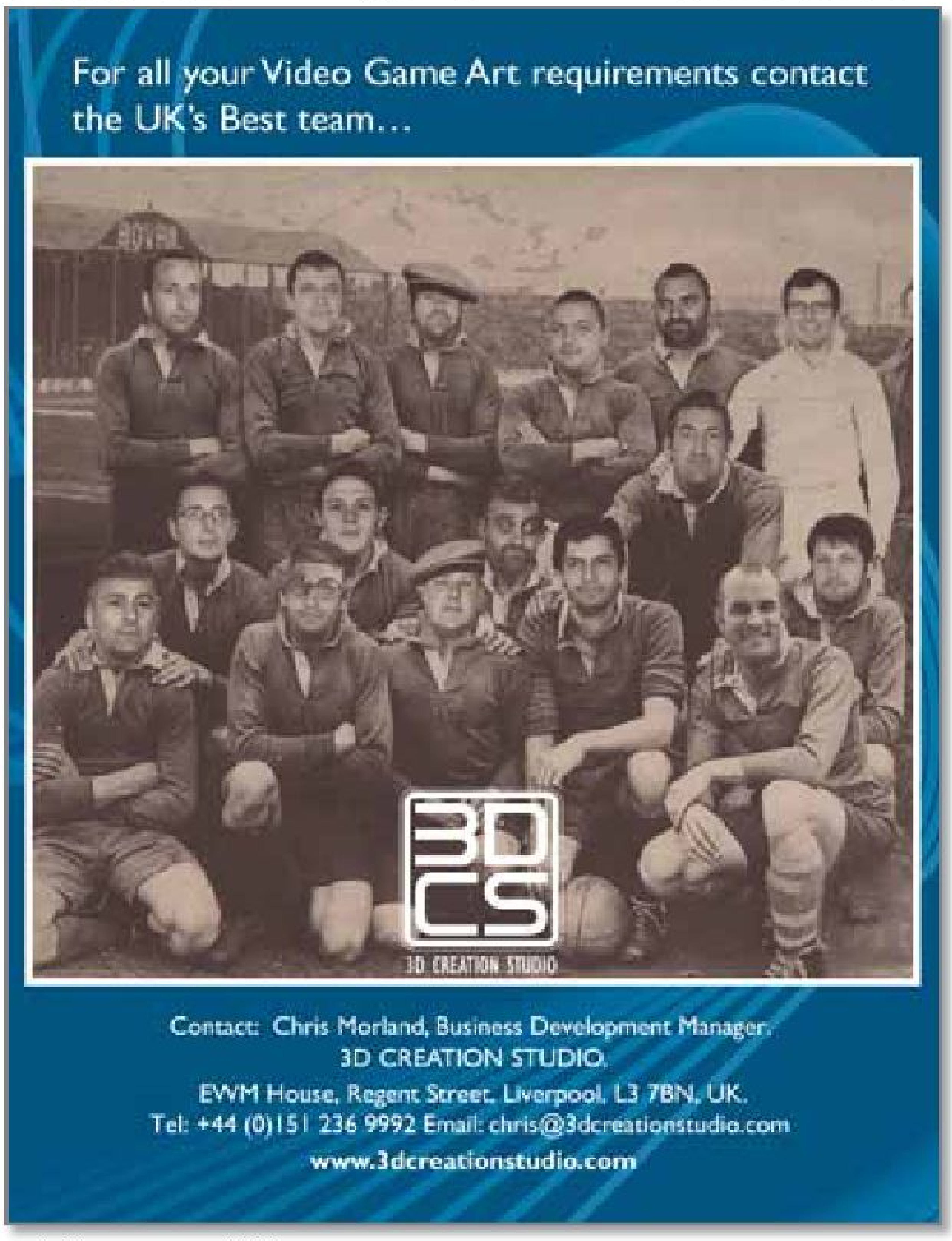

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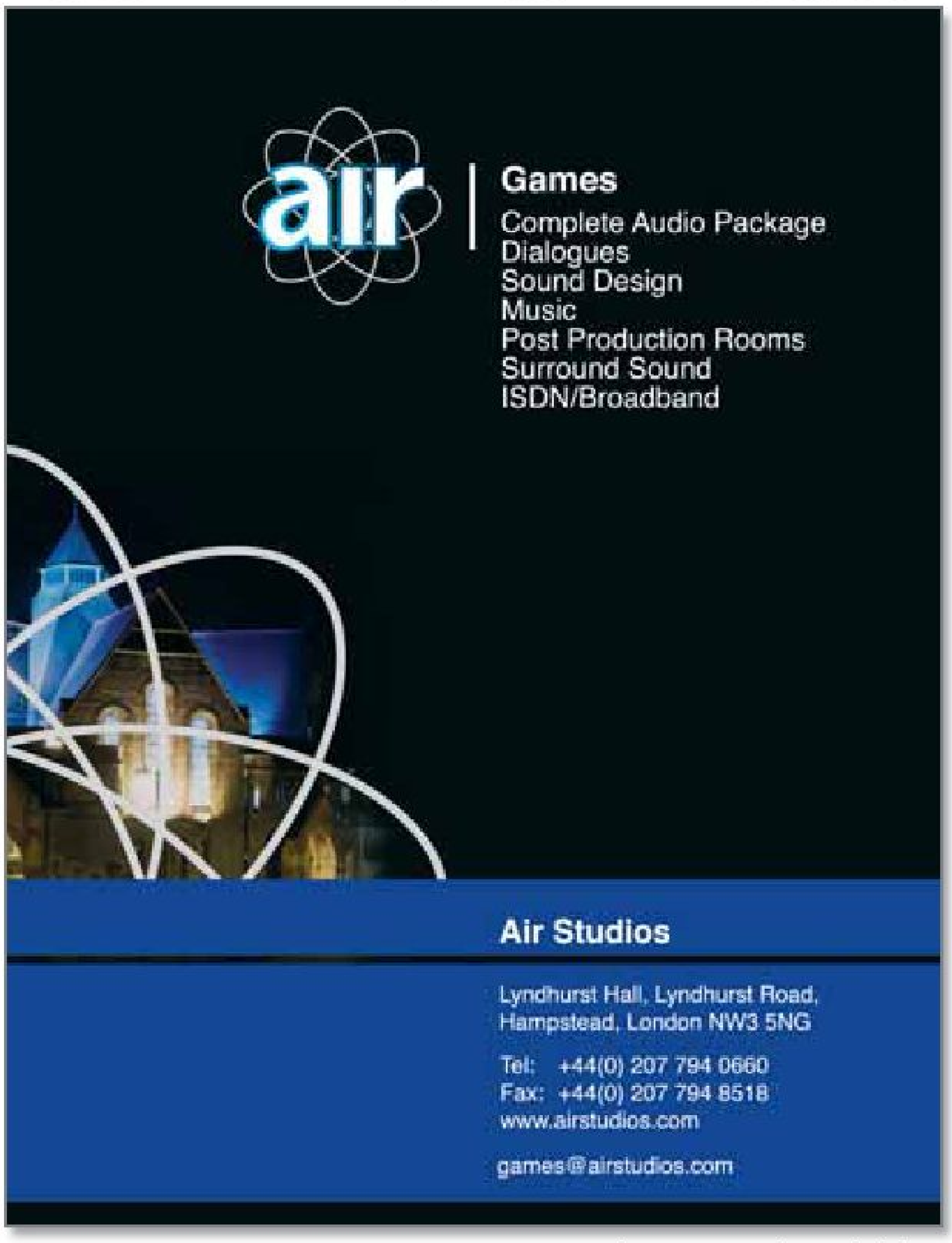

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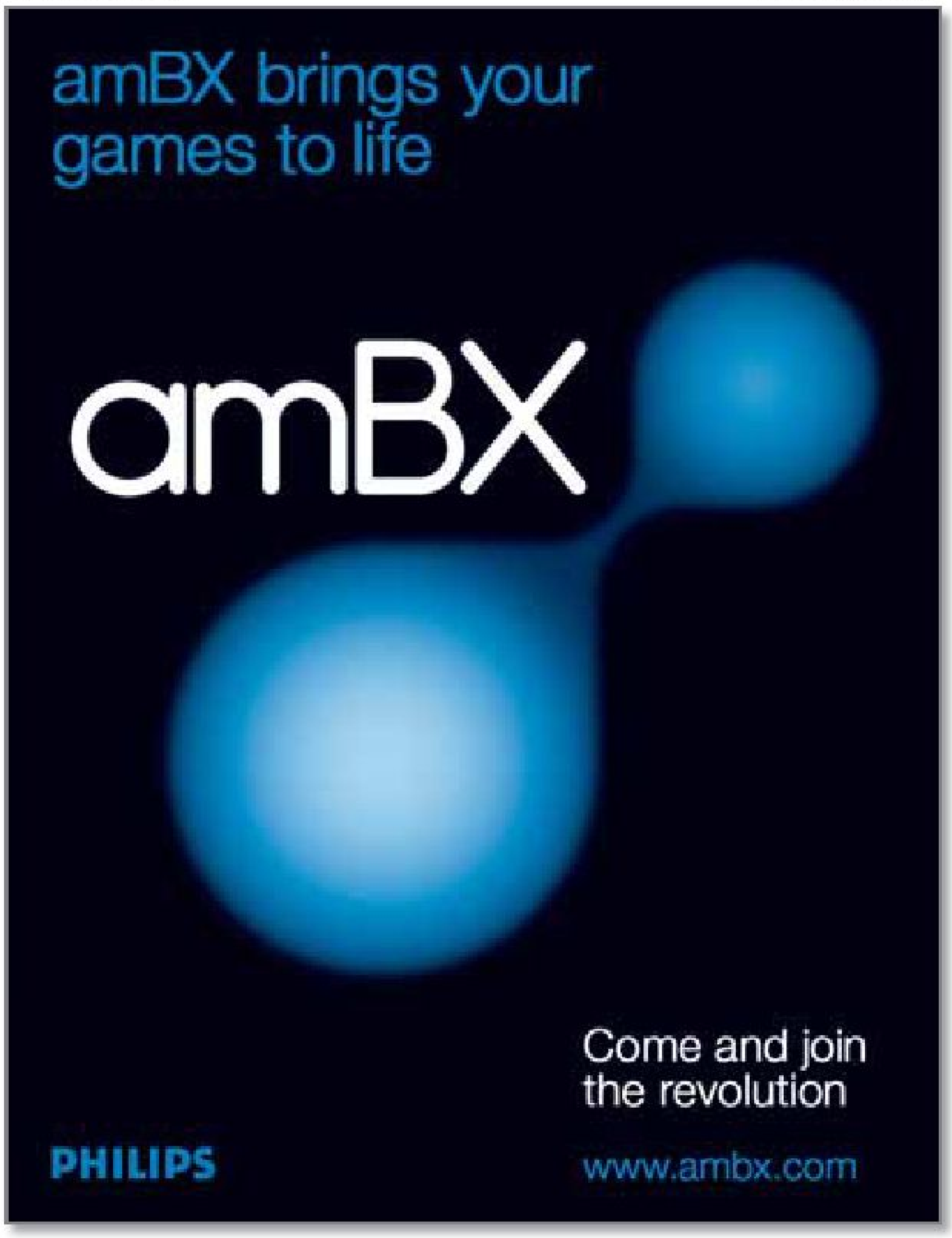
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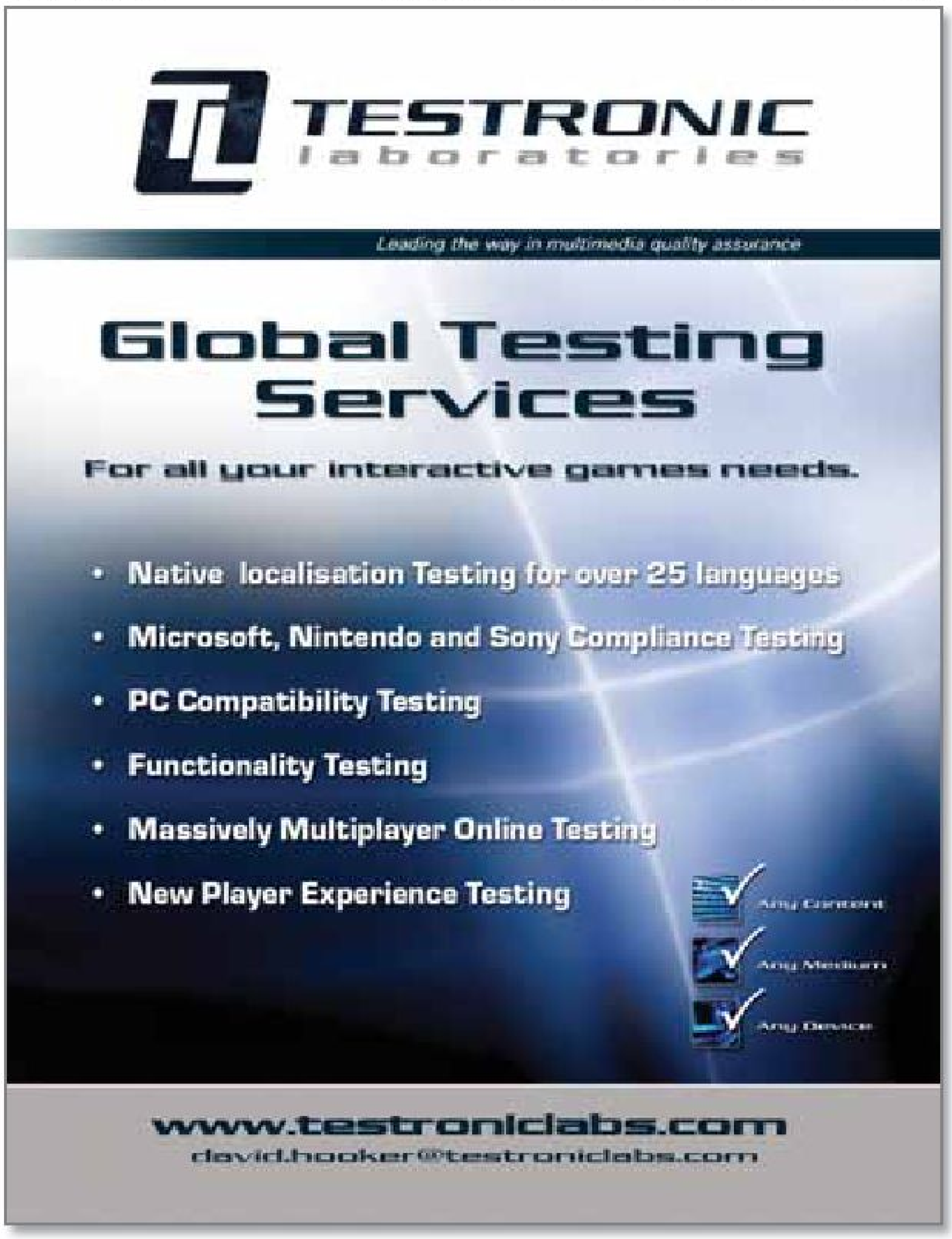
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Services Spotlight

OUTSOURCE MEDIA UK

FACTFILE
Area of expertise: Voice recording
Location: Sheffield and London
W: www.omuk.com **E:** info@omuk.com

Key Personnel: Mark Estdale (director), Rachel Lankester (director), Pea Eigler (localisation), Kit Challis (post production), Mike Timm (Sheffield studio manager), Trine C Jensen (LA production coordinator)

Clients: Konami (*Silent Hill Origins*), Free Radical Design (*Haze*), Sony Liverpool (*F1 Championship Edition*), Atari (*The Witcher*), Rebellion (*Rogue Trooper*)

Trusting another company with the recording and delivery of voice performances is a pretty commonplace strategy now, that's for sure – but how on Earth do you pick from the huge amount of providers out there?

Outsource Media's approach is integration into the project as early as possible – it recommends, for example, that cast members get together with script writers and animators to nail character behaviours during the projects pre-production phase.

It has two studios in the UK, situated in London and Sheffield, and has partnerships with two more studios in LA. The facilities are set up for solo, and large crowd work with a range of equipment that can be cherry-picked for a project's particular needs.

Finally, the team also does work in the localisation field, performing translations of all materials, localisation testing and in-territory casting in recording, all in all of the major European and Asian languages.

CONTACT
Outsource Media UK
Unit 2, 22 Pakenham Street
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Tel: 0207 713 9000

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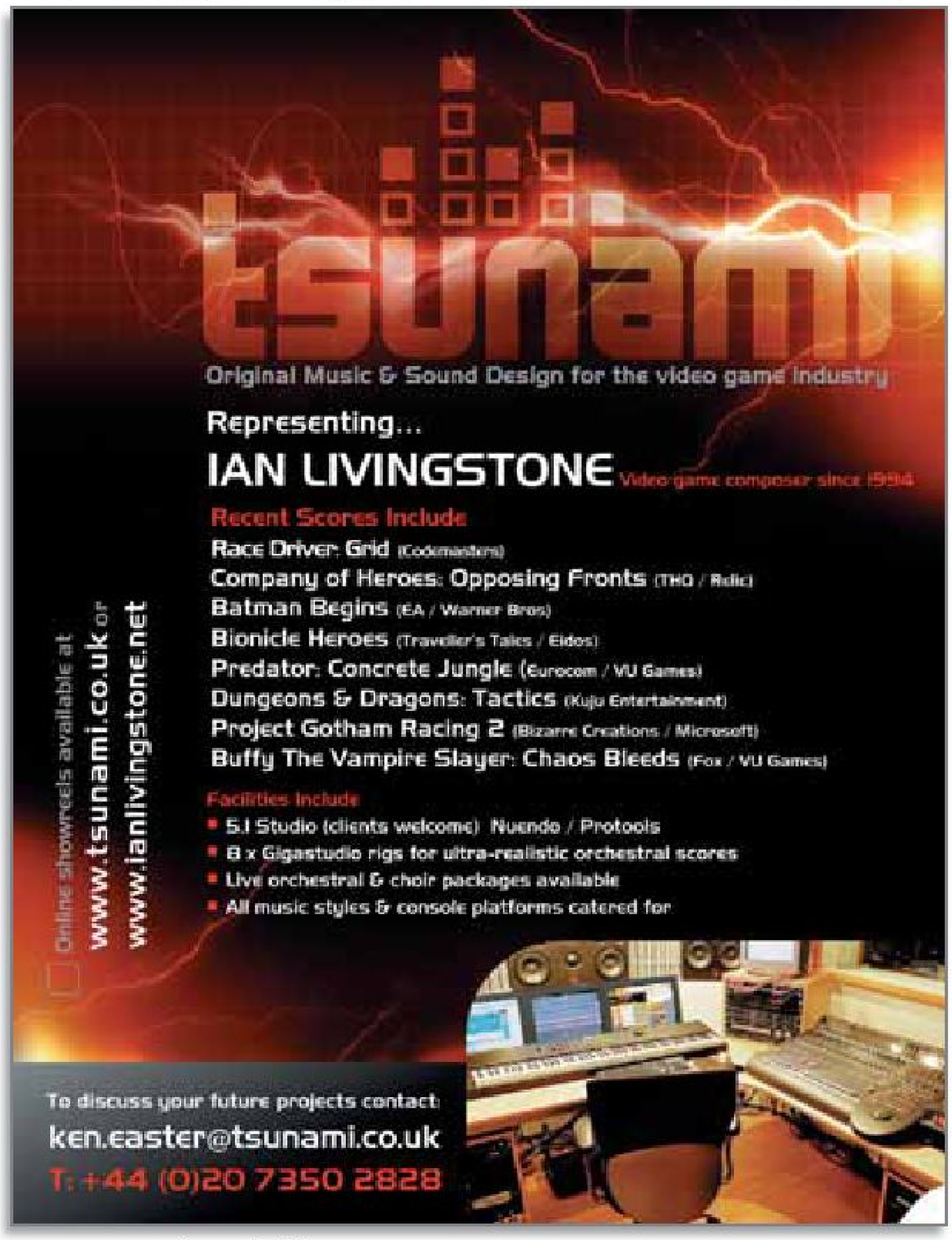

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Training News

Emergent targets casual gaming market

New studio **Dark Rock Games** has plans to help Wales snap up a piece of the UK games industry.

The studio was formed by University of Wales, Newport graduate Adam Griffiths along with three other graduates from the school's Games Development and Artificial Intelligence course. 31 year-old Griffiths decided to start the studio, in part funded to the tune of £20,000 from the Knowledge Exploitation Fund, because he didn't want to make his wife and children relocate.

"The computer games industry is one of the biggest in the world yet there are very few companies in Wales making games," he said. "As a result, many people like myself who are gaining degrees in computer game design are having to leave the country in order to find jobs.

"Newport University has two excellent computer games development courses producing talented students with lots of potential. It seems ludicrous that Wales is losing them to other countries because we have no computer games industry."

Dr Mike Reddy, senior lecturer in Computing at Newport Business School, added: "The release of this game represents a considerable success for Adam and his team at Dark Rock. He was always determined to create job opportunities for games developers in Wales and he has put his money where his mouth is with Dark Rock's first game, an imaginative version of the classic retro *Breakout*.

"At Newport, we believe it's essential to maintain close links with the computer games industry to enable our students to successfully find jobs when they graduate. We already have graduates working for major games companies such as Sega and Blitz, and this year sees the first woman graduate from the course."
www.darkrockgames.com

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- Computer Graphics using OpenGL and DirectX
- Linear Algebra and Matrix Operations
- 3D Modelling and Animation
- Game Development Workshop using Microsoft XNA

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Other related courses available:

MSc Computer Games Technology

BSc (Hons) Computer Animation and Visualisation

For further information on any of the above courses please contact:

Debbie Parker or Lucy Wilson
Admission and Information Officer,
Liverpool John Moores University,
School of Computing and
Mathematical Sciences,
Byrom Street, Liverpool, L3 3AF

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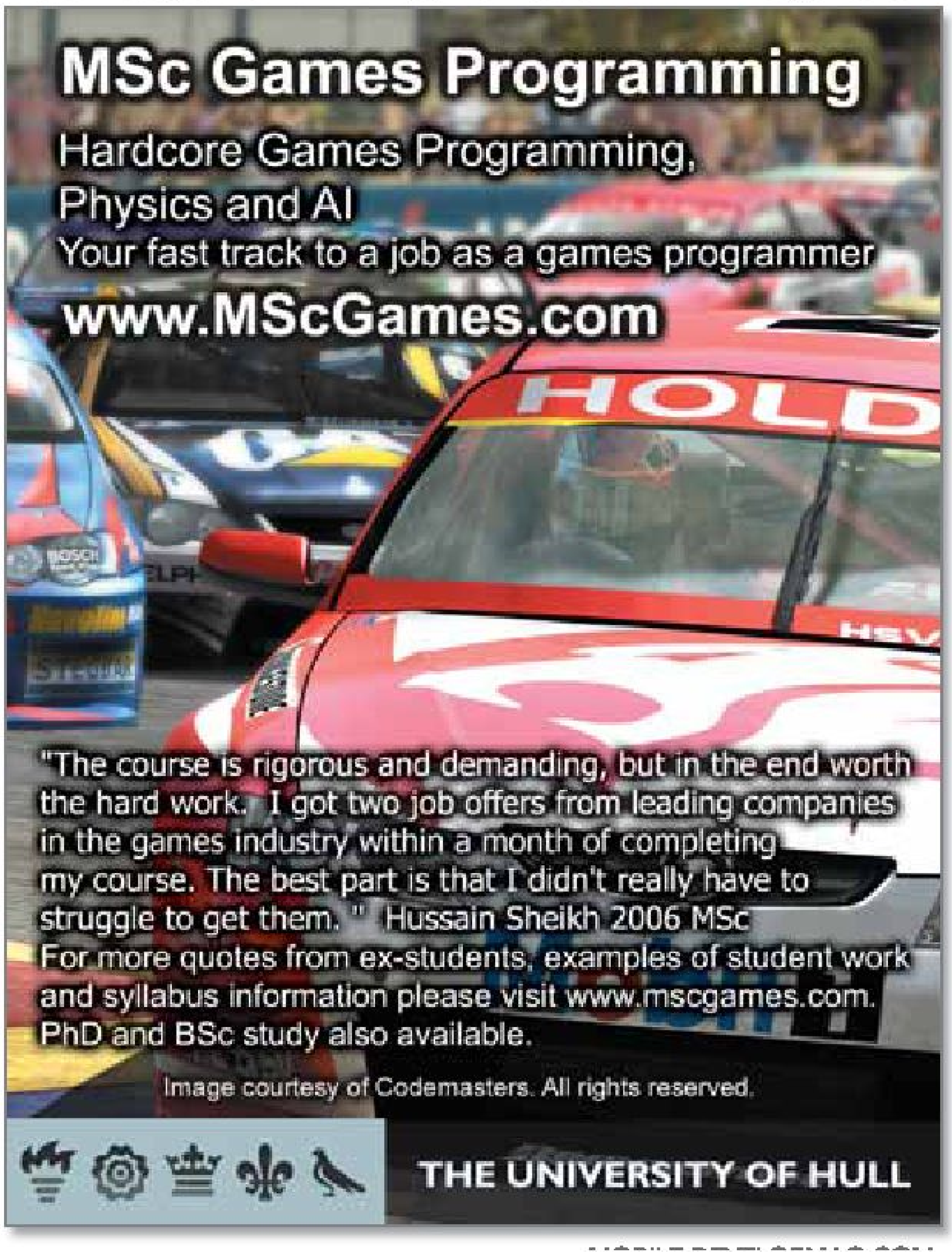

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For more quotes from ex-students, examples of student work and syllabus information please visit www.mscgames.com.
PhD and BSc study also available.

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THE BYRONIC MAN

Simon Byron's not in touch with the kids of today – not after signing the register, anyway...

I appreciate I'm not a teenage girl – despite what I may claim on the odd Internet chatroom – but I really don't understand Channel 4's youth strand 'T4'. Whenever Alexa Ching, Steve James, Dave Perry and any of the other identikit rent-a-pricks pop up between programmes, my toes curl, my fists clench and I feel a rising urge to murder.

It's been three this week already.

I can't specify exactly what it is that raises my hackles, because I find something new almost every time I see them. The male presenters sweat smarm, delivering their lines like friend-of-the-family child abusers, whilst the women seem to alternate between doing very bad impressions of Chris Morris and doing very bad impressions of Ricky Gervais. Badly.

Together, they define a collective noun of twats. I'm absolutely convinced that T4 started off as a drunken bet between TV executives, which has now got so far out of hand it cannot be stopped. Yet apparently the whole thing is incredibly popular. I just don't get it.

I'm man enough to admit that some things are beyond my comprehension. Jamie Oliver's another, as is Zane Lowe. Fuck it, chuck in Adam Sandler, *The Sunday Night Project*, Kings of Leon and *News At Ten* while you're at it.

But here's probably the most damning admission: the one which will get me hounded from the industry, head bowed so far in shame I'll be kicking myself in the nose as I flee.

I don't get *Braid*.

> ***"As a shareware game, Braid is nice enough. Clever, pretty, charming. But it's hardly innovative and certainly not the Second Coming…"***

Given my intense dislike for Xbox Live after byronicmanuk2-gate, it took a great deal of hype to get me to dig out my credit card and fill up my account in order to download *Braid*. But that's what I did, even managing to ignore the disgusting practise of charging an impossible 1200 points for the game (what next, Microsoft: reducing the RRP of the 360 to 101 pounds, but only accepting 50 pounds notes and giving no change?) – and I'm absolutely baffled by the thing.

As a shareware game, it's nice enough. Clever, pretty and charming, sure, but it's hardly innovative and certainly not the Second Coming, as it's been labelled by most of the Internet.

"*Braid* has the potential to change the way you think about reality," enthused Arthouse Games. Let's get one thing clear: *Braid* doesn't do that. Drugs do. *Braid* can change the way you think about a 2D version of *Blinx* and the *Sands of Time*, and it will make you smile now and again, but that's all. It's hardly heroin.

It's a question often posed by the industry's naval gazers: could games be considered art? I'm sure they have the potential, but only if we stop asking the question so vocally, or applying meaningless hype-filled tags every second. We don't, for example, see the genuine art world dub Damian Hurst's latest vomit 'painting of the year!' or see the *Times Literary Supplement* scream JK Rowling's written the 'best book ever' in large capital letters across its front cover, whilst giving away some stickers featuring characters from your favourite novels you can apply to your bookcase.

The developer, Jonathan Blow, seems like a reasonable enough chap, and *Braid* really is an okay videogame. But to me, all this hype and hullabaloo highlights the clever sleight of hand pulled by Microsoft in the first place.

Like gambling with casino tokens, you never know how much you're spending. We think *Braid* 's a quaint diversion, programmed competently and with care, but because we didn't actually go into an actual shop and actually hand over actual money we'd worked long and hard for, we've missed the trick it pulled.

So here's a real-life *Braid* experiment. Go load up some classical music. Look at a few paintings done by teenagers, and imagine an angst-ridden narrative composed by someone too young to feel genuine angst. Count 12 pounds out one coin at a time into a neat little pile. Then chuck them down the toilet. Hit X to rewind time and get those coins back. Oh, it doesn't work. Now that's how clever *Braid* is.

simon@thetriforce.com

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develop FORWARD PLANNER

OCTOBER 2008

Publication date: October 6th
Special Feature: Face/body graphics
Events: Game Connection Lyon, Handheld Learning 2008

NOVEMBER 2008

Publication date: November 10th
Special Feature: Security

DEC 08 / JAN 09

Publication date: December 15th
Special Feature: QA, Testing & Localisation

FEBURARY 2009

Special Feature: Recruitment
Event: GamesGrads

MARCH 2009

Events: GDC 2009, Game Connection America

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DEVELOP 100 - SPECIAL ISSUE

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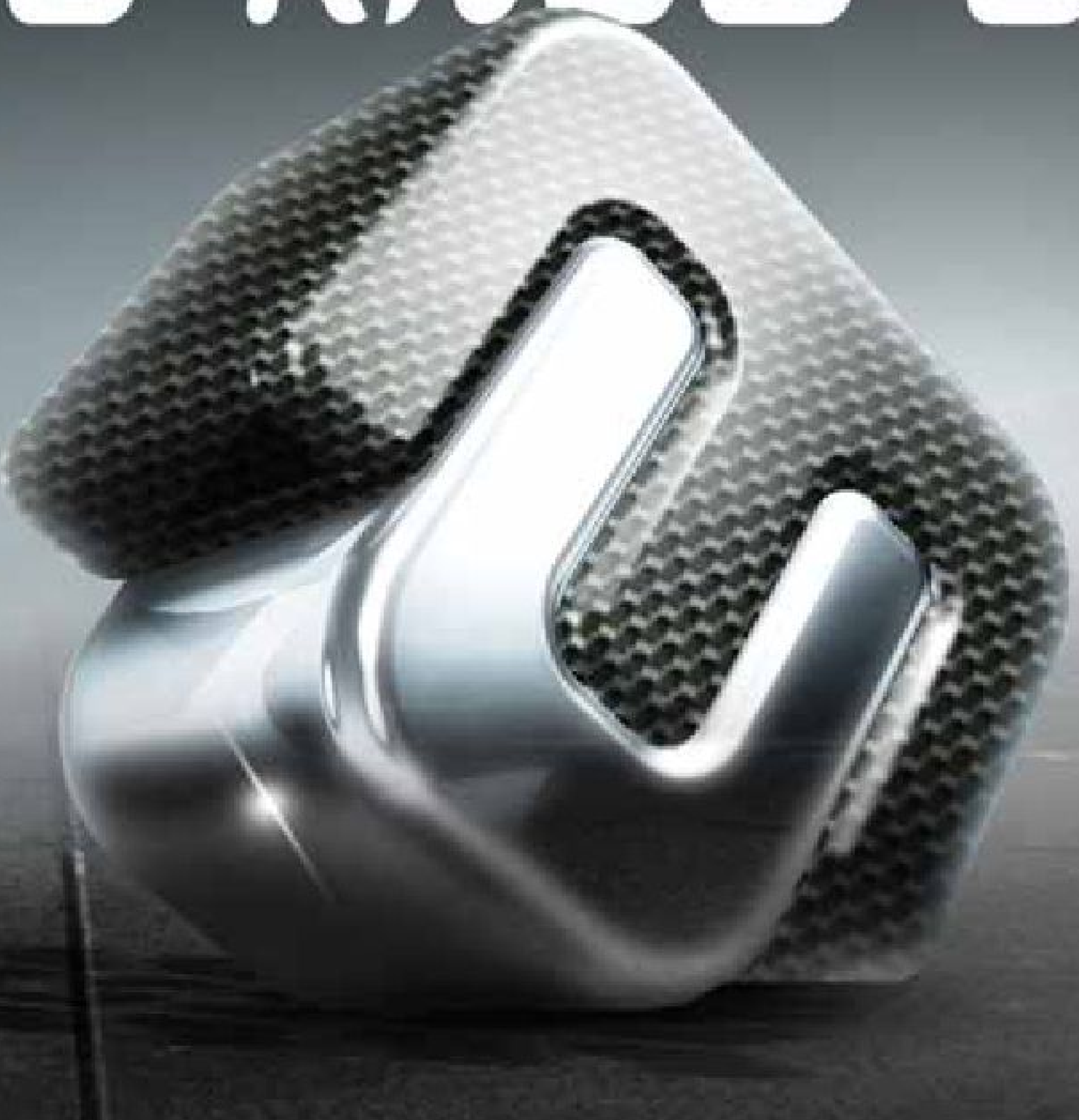

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